# HR306

# **Configuration of Time Recording**

# PARTICIPANT HANDBOOK INSTRUCTOR-LED TRAINING

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# **Typographic Conventions**

American English is the standard used in this handbook.

The following typographic conventions are also used.

This information is displayed in the instructor's presentation	<b>=</b>
Demonstration	>
Procedure	2 3
Warning or Caution	A
Hint	
Related or Additional Information	<b>&gt;&gt;</b>
Facilitated Discussion	
User interface control	Example text
Window title	Example text



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# **Course Overview**

#### **TARGET AUDIENCE**

This course is intended for the following audiences:

- Application Consultant
- Data Consultant
- Super / Key / Power User



# **UNIT 1** Time Recording

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#### **UNIT OBJECTIVES**

- Identify time management concepts
- Identify existing roles in time management
- Outline employee time recording options
- Record employee time data



## Unit 1 Lesson 1

# Identifying the Foundations of Time Management

#### **LESSON OVERVIEW**

This lesson provides an overview of time management and explains how it is integrated with other applications.

#### **Business Example**

As the Time Administrator, you are responsible for the maintenance of the time application. For this reason, you require the following knowledge:

An understanding of time management concepts



#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Identify time management concepts

#### **Time Management Foundations**





Time Management provides you with a flexible means of setting up, recording, and evaluating working times. You can manage time accounts (for example, leave, flextime, and so on)



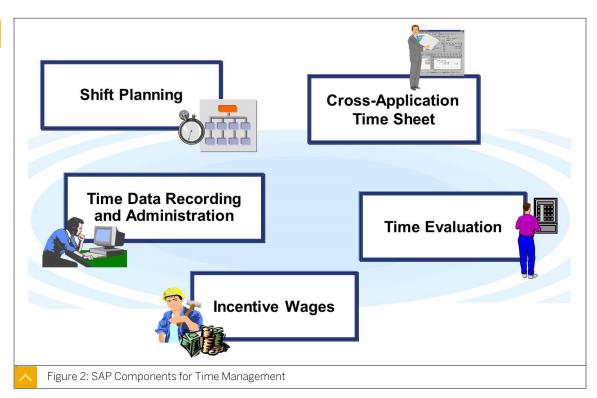
manually or automatically. You can enter time manually by using time recording systems or Employee Self-Service (ESS).

Information about the work performed by employees and their availability to work is an essential element of a Human Resource Management System. Information about working times is transferred to Payroll to calculate employees' gross pay. This time data is also transferred to other application areas, such as Controlling and Logistics, and is an important factor in enterprise-wise decision making.

Working times can be allocated as activities in Controlling, and the resultant costs can be assigned to the appropriate source. Time Management information is used within Logistics to determine employee availability for capacity planning purposes. Based on Time Management information, work requirements for the company as a whole can be determined and employee shifts can be scheduled. Time tickets can be generated automatically from plant data collection (PDC) postings.

#### **Components for Time Management**





You can customize the functions available in Time Management according to the requirements of your company.

#### **Examples of the functions included in Time Management are as follows:**

- Administration of leave and illness times
- Personnel capacity planning
- Valuation of attendance and absence times using time accounts
- Determination of overtime and bonus wage types
- Processing of incentive wages, such as piecework

#### Time Management includes the following components:

#### **Cross-Application Time Sheet**

- CATS allows you to enter your actual time, for example, your attendances, absences, and employee remuneration information.
- CATS data can be transferred to Controlling, Human Resources, and Logistics for further processing.

#### **Incentive Wages**

- Incentive Wages are used for performance-related compensation. You can set up different wage types based on time, premiums, or piecework.
- Incentive Wages can be implemented for individuals or groups.
- The Incentive Wages component reads employee data from the Logistics system, prepares the data according to the type of payment, and transfers the data to Payroll.

#### **Shift Planning**

• Shift Planning allows you to assign shift times, locations, type of personnel, and the number of employees required to optimize staff assignments.

#### Time Data Recording and Administration

• Time Data Recording and Administration enables you to maintain working hours for employees.

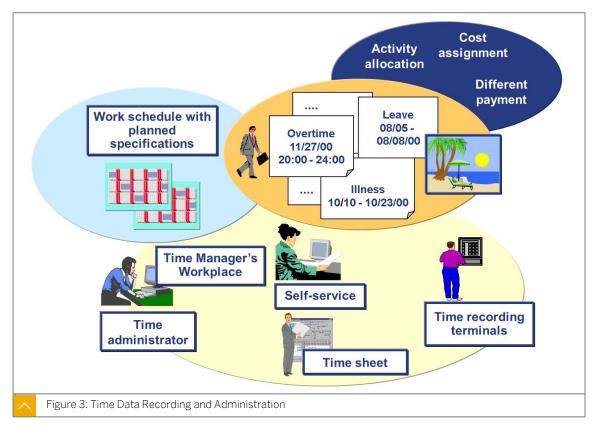
#### Time Evaluation

- Time Evaluation gathers planned working times and overtime, manages time accounts (such as flextime balances, overtime, and productive hours), updates time quotas, and checks working time provisions. Time evaluation prepares the time data which is valuated in Payroll.
- Time Evaluation creates time wage types that are evaluated in Payroll.

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#### **Time Data Recording and Administration**





The central element in Time Management is an employee's work schedule. This includes the planned specifications, including breaks, according to which employees are to work. Depending on the type of Time Management in your company, you record either deviations from the employee work schedules or only the actual times that employees work.

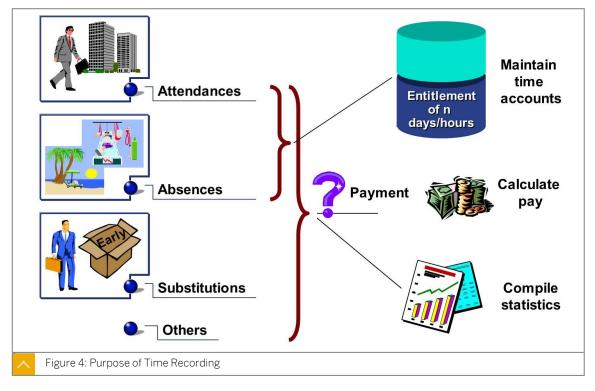
There are various options for recording working times. You can enter time data manually online, use time recording systems, or use Employee Self-Service applications. Time data is processed in the same way, regardless of which recording method is used.

Time Management supports centralized data entry by administrators and decentralized time entry by employees in individual departments (such as a supervisor in the production area).

Information about different payments can also be entered along with time data. Working times can be allocated as activities in Controlling, and the costs resulting from working times can be assigned to the appropriate source.

#### **Purpose of Time Recording**





Time data such as changes in planned specifications, attendances (for example, time worked, business trips, or additional training), and absences (leave, illness, and so on) is recorded for employees.

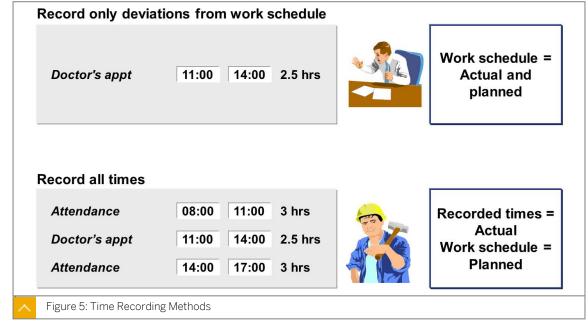
#### You can use this time data for the following purposes:

- To determine the applicable overtime bonuses for overtime worked. For example, you want to compensate work on Sundays at a different rate to that used for normal workdays.
- To maintain time accounts. For example, instead of remunerating overtime, you may want to have it accrued in a time account. When the employee takes time off (absence), this amount is deducted from the time recorded in the time account.
- To compile statistics. For example, you can evaluate overtime levels or illness-related absences in individual departments.
- To enter specifications for different payment or account assignment information along with time data. Certain time data, for example, attendances, absences, and employee remuneration information, can also be recorded for internal allocation purposes. This data is then evaluated in Payroll and Controlling.

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#### **Time Recording Methods**





You can use one of the following methods to record employee time data in the SAP system:

#### Record only deviations from the work schedule:

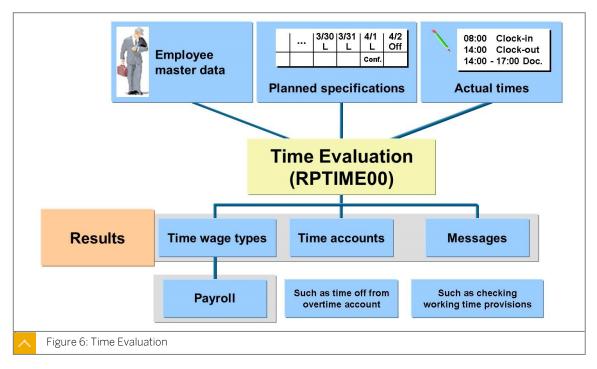
In this method, only time data that represents an exception to the employee's work schedule is recorded. You can record employee data (such as illness), schedule and record substitutions, and enter an employee's standard annual leave. This method is referred to as negative time management.

#### Record actual time:

In this method, you record all actual times, such as actual working time and absences. This method is referred to as positive time management.

#### **Time Evaluation**





Employees' time data is valuated in Time Evaluation. Time evaluation calculates planned working times and overtime, creates wage types, updates time quotas, and checks working time provisions. The time wage types that are created during time evaluation are valuated in Payroll.

Time evaluation is carried out by the Time Evaluation driver RPTIMEOO. The steps to be carried out by RPTIMEOO are specified in a personnel calculation schema. The standard system contains several personnel calculation schemas that cover various requirements and strategies for evaluating data.

#### The following list provides examples of processes that involve schemas:

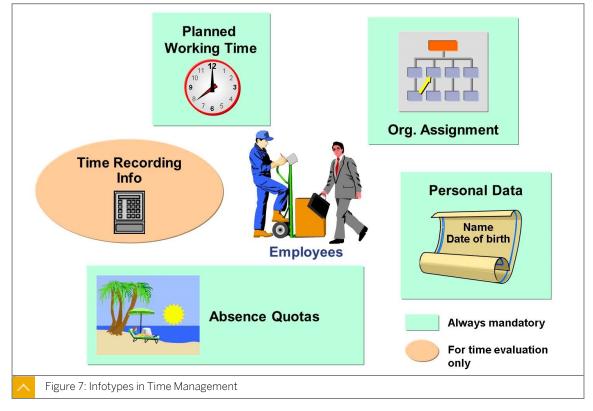
- Time Management that records all actual working times of employees in addition to deviations to the work schedule
- Time Management that only records the deviations to the work schedule
- The processing of time data for which only the work duration, not the start and end times, is recorded

The processing rules for time evaluation can be modified to meet your business requirements.



#### **Time Management Infotypes**





In Time Management, certain master data infotype records must be available for each employee. Time Management data is stored in the same master data records that are used in other Human Resource areas such as Payroll and Personnel Administration.

# The following infotypes are required for the integration of Time Management master data records:

#### Organizational Assignment (0001):

This infotype is used to store the details of the assignments of the employee, such as personnel area, personnel subarea, and the employee group and subgroup to which an employee belongs.

#### Personal Data (0002):

This infotype is used to manage the personal data of an employee.

#### Planned Working Time (0007):

The appropriate Time Management status must be stored in this infotype. This infotype determines whether and how employee time data is to be processed in Time Evaluation or Payroll.

#### Time Recording Information (0050):

This infotype is used only if Time Evaluation is used. It can contain interface data for the subsystem and additional employee information for time evaluation.

#### Absence Quotas (2006):

This infotype is used to manage leave.

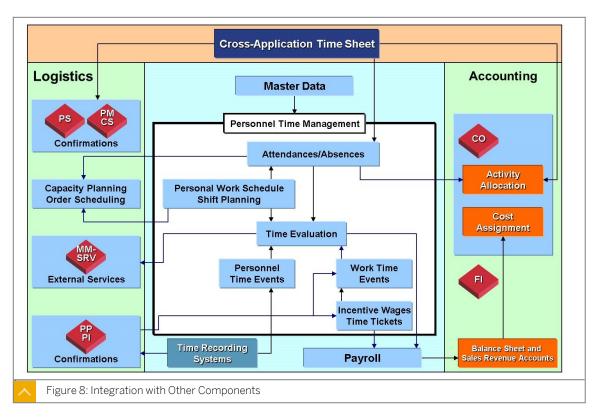


#### Note

The *Payroll Status* infotype (0003), which the system usually creates automatically when an employee is hired, determines the start date for the next Time Evaluation run.

#### **Time Management Integration with SAP Components**





Time Management is directly and indirectly linked with various components, both within Human Resources and in other applications.

#### **Examples of Time Management integration are as follows:**

- Working times entered in the Cross-Application Time Sheet are transferred as
  attendances to Time Management and as confirmations to Logistics. Attendances are
  transferred to Time Evaluation for further processing. Time balances and time types are
  formed, which are then transferred to Payroll. Finally, the results are transferred to Payroll.
  The Payroll results are transferred to Financial Accounting. In Financial Accounting, the
  master cost center of the employees is debited according to the information from the
  confirmation.
- Employee attendances and absences serve as information about employees' availability for capacity planning in Logistics.
- Working times recorded in time-recording systems are transferred as personnel time events to Time Management and are processed in Time Evaluation. The wage types that are generated are made available to Payroll.

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#### **LESSON SUMMARY**

You should now be able to:

• Identify time management concepts

## Unit 1 Lesson 2

### Identifying the Roles in Time Management

#### **LESSON OVERVIEW**

This lesson explains the roles that exist in Time Management. It also explains how you can review the existing roles.

#### **Business Example**

You need to configure the time data recording option for employees based on their role. For this reason, you require the following knowledge:

An understanding of Time Management roles



#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

· Identify existing roles in time management

#### **Roles in Time Data Recording**







Records payroll-relevant employee data

**HR** administrator



#### **Individual Departments**

Time administrators: secretaries, supervisors, and foremen Record and manage employee time data for assigned employees (groups of 10-30 persons)



Internal and external employees

Enter their own time data using time sheets, time recording terminals, self-service applications, and so on

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Figure 9: Who Records Time Data?

Entering, maintaining, and evaluating employee time data is often decentralized. The time data is processed in individual departments, not centrally in the HR department.

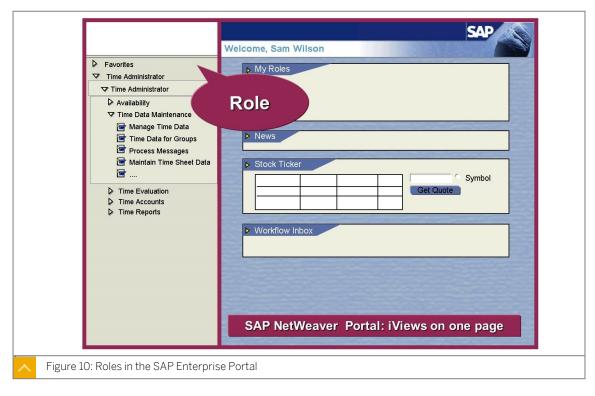
The main characteristic of decentralized time management is the delegation of time management tasks to individual departments. Persons who carry out time-management tasks in the departments are usually responsible for small-sized to medium-sized groups of 10 to 30 employees.

Another aspect of decentralization is the inclusion of employees. For example, employees record their own working hours using self-service applications and access information on their work schedules, time accounts, and so on.

HR administrators in the central HR department are responsible for entering any additional payroll-relevant employee data, for example, specifications for continued pay in the event of illness.

#### **Roles in Time Management**





Roles correspond to certain tasks and functions that employees carry out in an enterprise. A role is assigned to users with the same area of responsibility.

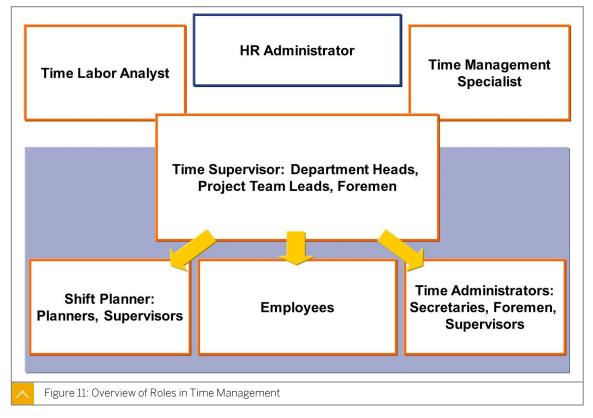
Users access their transactions, reports, Web-based applications, and so on, from user menus. User menus contain only the functions required for completing the typical daily tasks of specific users. A role also contains the necessary access authorizations.

Users can access their role-specific user menus from SAP Enterprise Portal. If they do not use the portal, you can set up their user roles in the SAP system.

You can assign as many users to a role as you require. Composite Roles contain several single roles. For example, the composite role *HR Controller* consists of the single role *Employee Time and Labor Controller* in addition to other single roles.

#### **Overview of Roles in Time Management**





#### The following single roles exist in Time Management:

#### Time and Labor Analyst:

This person monitors employee time and labor data in relation to strategic company goals. For example, the time and labor analyst creates reports detailing the work levels of all departments or employee groups and overtime levels. The Time and Labor Analyst (SAP\_HR\_PT\_TIME-LABOR-ANALYST) single role is assigned to the HR Analyst (SAP\_WP\_HR-ANALYST) composite role. A composite role contains one or more single roles.

#### Time Management Specialist:

This person is responsible for the seamless operation of the Time Management system. The time management specialist is concerned with the technical side of the SAP system. The tasks include making recurring settings, maintaining interfaces to other systems and SAP applications, and (when required) modifying or adding HR-specific Customizing. The Time Management Specialist (SAP\_HR\_PT\_TIME-MGMT-SPECIALIST) single role is contained in the HR Systems Specialist (SAP\_WP\_HR-SYSTEM-SPEC) composite role.

#### Shift Planner:

Employees in individual departments in an enterprise, for example, supervisors and department heads, often perform the role of shift planner. Shift planners schedule working hours, shifts, or known absences for the employees assigned to them. They manage employee qualifications, working time preferences, legal regulations, company policies, and cost aspects during planning. The Shift Planner (SAP\_WP\_SHIFT-PLANNER) composite role contains the Shift Planner (SAP\_HR\_PT\_SHIFT PLANNER) single role.

#### Time Supervisor:

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This person is responsible for planning and managing employee time and labor. Time supervisors delegate certain Time Management tasks to employees in their departments (such as time administrators). The Time Supervisor role is performed by senior employees in individual departments in an enterprise, such as managers, department heads, or foremen. The Manager Generic (SAP\_WP\_MANAGER) composite role contains the Time Supervisor (SAP\_HR\_PT\_TIME-SUPERVISOR) single role.

#### Time Administrator:

This person is responsible for correctly recording and maintaining the time data of employees assigned to them, in addition to other job tasks. The tasks include checking employee availability, entering changes in working times, absences, attendances, and bonuses, including information required for posting or payment. The Time Administrator (SAP\_WP\_TIME-ADMINISTRATOR) composite role contains the Time Administrator (SAP\_HR\_PT\_TIME-ADMINISTRATOR) single role.

The roles of time supervisor and time administrator can be performed by the same person.

Employees can use the Internet or the intranet to enter or display their own time data. This relieves the corporate HR department and departmental time administrators of these tasks.



#### **LESSON SUMMARY**

You should now be able to:

· Identify existing roles in time management

### **Evaluating Time Recording Options**

#### **LESSON OVERVIEW**

This lesson shows you how to record employee time data.

#### **Business Example**

As a time administrator, you are responsible for recording employee time data. For this reason, you require the following knowledge:

- An understanding of time recording options
- An understanding of time infotypes
- · An understanding of the use of time recording tools for recording time data



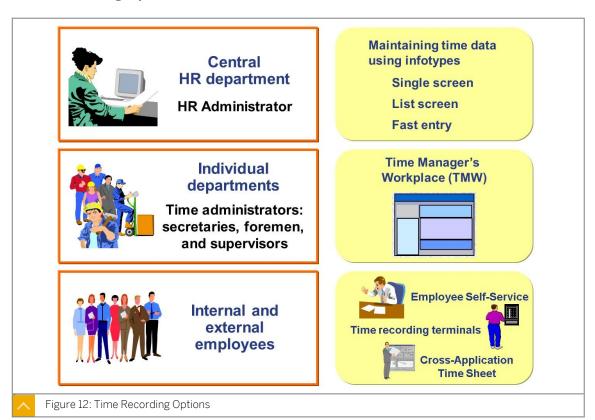
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

- Outline employee time recording options
- Record employee time data

#### **Time Recording Options**





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In decentralized Time Management, administrators have to supplement the employee time and labor data with payment-related or other administrative information. These administrators use the functions provided in *Infotype Maintenance* for single screen, list screen, and fast entry.

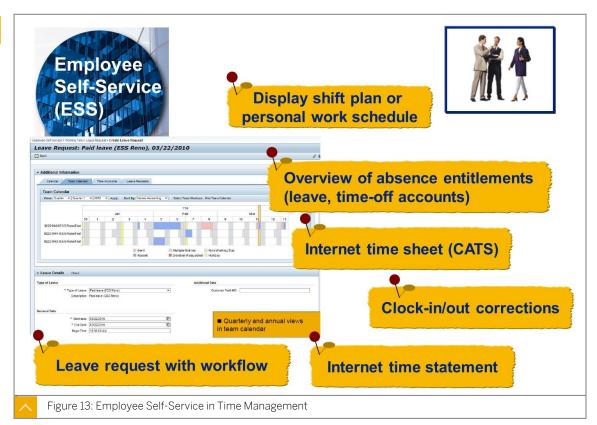
Decentralized time administrators use the TMW to optimize the recording and maintenance of time data. The TMW is also used for message processing.

# Employees can use the following options for recording or displaying their own personal data:

- Front-end time recording terminals
- ESS applications in the Internet or the intranet
- Cross-Application Timesheet

#### **Employee Self-Service**





Employees can also use Internet Application Components (IACs) for Time Management to display and maintain their own data.

#### **Employees can perform the following activities:**

#### Display shift plan or personal work schedule:

Employees can display their working hours for the next few days or weeks.

#### Display time accounts (absence entitlements):

Employees can find information about their past, current, or future absence entitlements.

#### Internet timesheet:

Employees can enter their own working hours in a timesheet from the Internet or the company intranet.

#### Internet time statement:

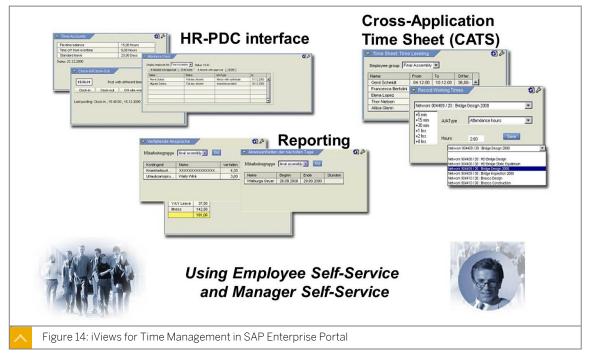
Employees can obtain an overview of day-based balances, period-based balances, and wage types determined for them during time evaluation. Employees can display and print their time statement from the Internet.

#### Leave request with workflow:

Employees can submit a leave request or inform their supervisor that they need to be absent for a particular period of time (such as in case of illness). When an employee creates a leave request, it triggers a workflow; and the request is automatically sent to the Internet or intranet inbox of that employee's manager. The employee's manager can approve or reject the leave request.

#### iViews for Time Management





SAP NetWeaver Portal contains a range of iViews for displaying and maintaining time data. iViews are simple, self-contained applications that are displayed on a page in the portal.

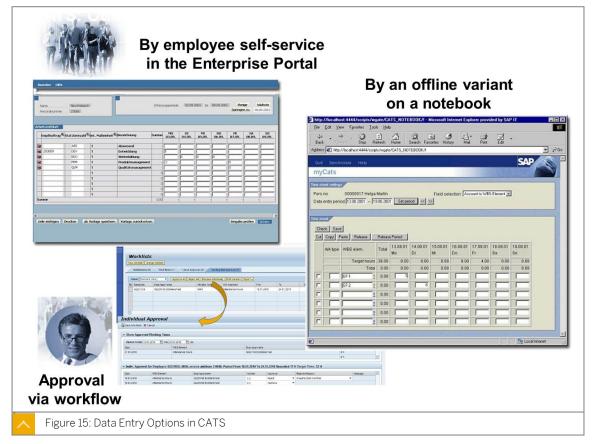
You can query and maintain Time Management data directly by using the Employee Self-Service (ESS) portal or the Manager Self-Service (MSS) portal.

The system accesses the Plant Data Collection: Time & Attendance and Employee Expenditures (HR-PDC) interfaces or the CATS for time data maintenance in the background.



#### **Cross-Application Time Sheets**





An Internet version of the Cross-Application Timesheet is available for employees. You can access and maintain this version by using ESS in the browser. You can install the offline version, called the CATS notebook, locally on a laptop. This enables you to enter data even when there is no connection to the SAP system; the data can subsequently be synchronized with the system.

You can still maintain the data directly in the SAP system.

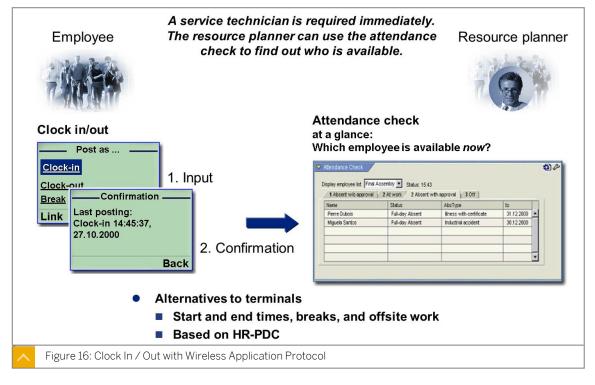


#### Note

For more information, see <a href="www.service.sap.com/hr">www.service.sap.com/hr</a> or <a href="www.help.sap.com">www.help.sap.com</a>. Refer to SAP Note 497017.

#### Wireless Application Protocol





Wireless Application Protocol (WAP) is a new addition to CATS. WAP is the protocol layer for data transfer (time events and time data) using mobile devices such as cell phones. The connection to the SAP system is provided by the HR-PDC standardized interface. The posting is processed in the system and can then be displayed using an ESS scenario, for example. Employees can post time events and time data using a WAP-enabled mobile device.

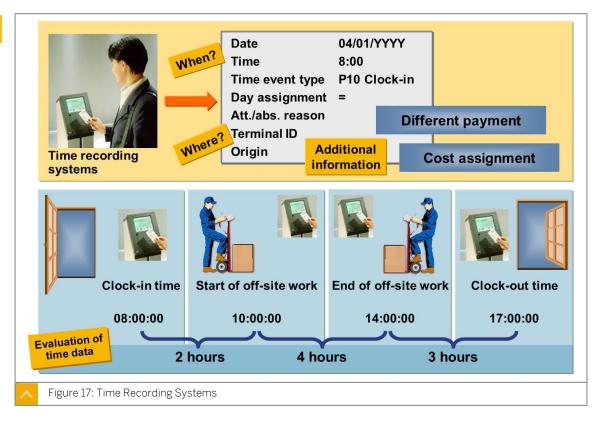
#### WAP offers the following benefits:

- Business processes tailored to employees requirements
- Focus on minimum information
- Optimized default values
- Minimized user input
- Minimal screen switches
- Personal Identification Number (PIN) used for security



#### **Time Recording Systems**





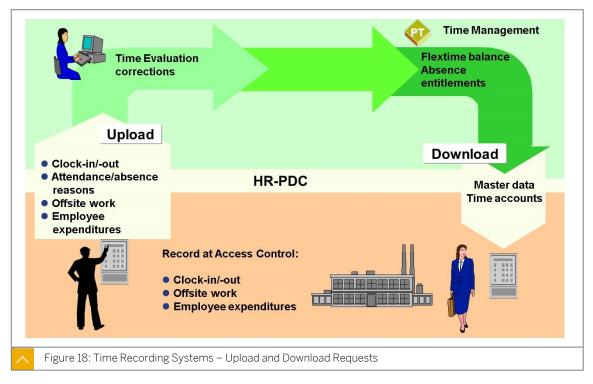
Employees can record time events, such as clock-in or clock-out postings at external time recording terminals, along with additional information on cost assignment and different payment.

Communication between time recording systems and Time Management takes place through a standardized interface called Plant Data Collection: Time & Attendance and Employee Expenditures (HR-PDC). Using HR-PDC, you can upload time events and employee expenditures recorded by external recording systems to Time Management. Similarly, you can download master data, control data, and transaction data (such as employee balances) from Time Management to the recording system.

Time events processed in Logistics during plant data collection can also be uploaded to the Time Management system through standardized interfaces. This data can also be transferred from individual Logistics components to Human Resources, if required.

#### **Upload and Download Requests**



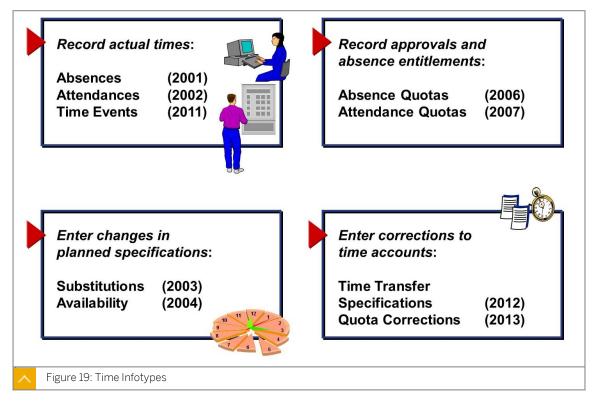


After an upload request, time events are uploaded to the Time Management system. Data can be uploaded several times daily. Data is stored in the CC1TEV table in the SAP system. The data in the CC1TEV table is read during a subsequent posting of time events and then stored as time events in the TEVEN table.

The download supplies the time recording system with data from the SAP system. Master data from applications such as HR master data and control data, such as attendance and absence reasons, and time event types, are supplied to the time recording system to be used for validation purposes. The time recording system is supplied with transaction data (time accounts) and employees can display their time account balances at terminals.

#### **Time Infotypes**



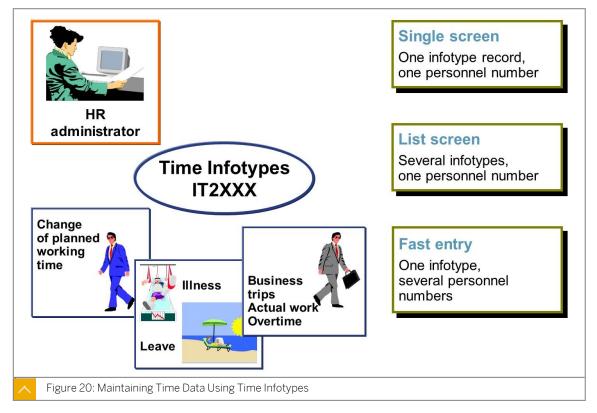


Time infotypes are used for maintaining and displaying time data. The figure shows an overview of time infotypes. The *Time Events* (2011), *Time Transfer Specifications* (2012), and *Quota Corrections* (2013) time infotypes are relevant only for time evaluation.

Time infotypes are also subdivided into subtypes. For example, various forms of absences or absence types – such as illness with certificate, illness without certificate, and leave – are recorded using the subtypes of the *Absences* infotype (2001).

#### Time Data Recording Using Infotypes





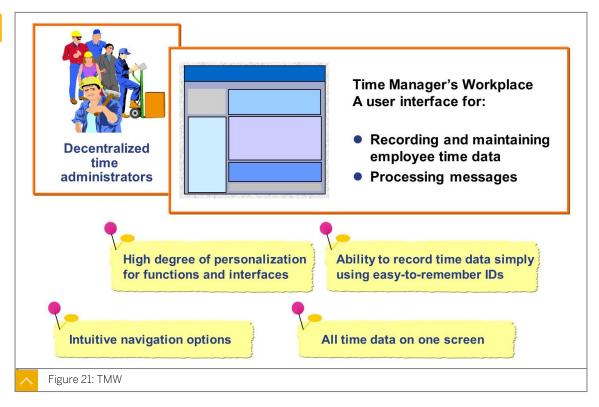
#### The following options are available for recording time data using infotypes:

- Single screen: This option is used to record one infotype for one employee.
- List screen: This option is used to record several records of one infotype for one employee.
- Fast entry: This option is used to record one infotype for several employees.

The object manager is available when you maintain time data (in transaction PA61) and display time data (in transaction PA51). You can use these transactions to search for employees for whom you want to display or process data. The object manager is divided into a search area and a selection area. Using search tools, you can search for objects to be displayed in the selection area.

#### Time Manager's Workplace





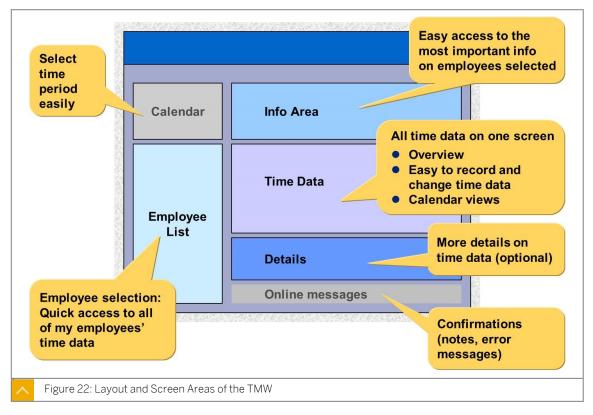
Supervisors, foremen, or administrative assistants usually maintain time data for a manageable number of employees in the Time Manager's Workplace (TMW).

#### Some of the advantages of using the TMW are as follows:

- All time data can be entered, corrected, or supplemented on one screen.
- Intuitive navigation options are available.
- Time data is recorded using easily recognizable time data identifiers (IDs).
- Time administrators can select different views (for example, multi-day, multi-person, one-day, and team view) to maintain time data.
- The TMW can be personalized. You can customize the TMW to match each user's tasks with the available applicable functions.

#### Screen Areas of the Time Manager's Workplace





The Time Data Maintenance and Message Processing tasks are delivered in the TMW in the standard system. The layout of screen areas of the Time Data Maintenance and the Message Processing tasks are similar.

#### The various screen areas of the TMW are as follows:

#### Calendar:

This area is used to select the time period for which time data is to be entered.

#### **Employee list:**

This area is used to display additional information for any selected employee, for example, details on master data or time accounts.

#### Info area:

This area contains the names of employees assigned to the time administrator. Time administrators can select the employee or employees from this list for whom they want to enter or change time data.

#### Time data:

This area is used to enter and maintain time data using intuitive time data IDs, for example, "I" for illness or "L" for leave.

#### Details:

This area is used for entering additional specifications for the time data, for example, activity allocation specifications for an attendance. Information on time data recorded is also visible here, for example, the name of the person who entered the data, the date on which data was entered, and so on.

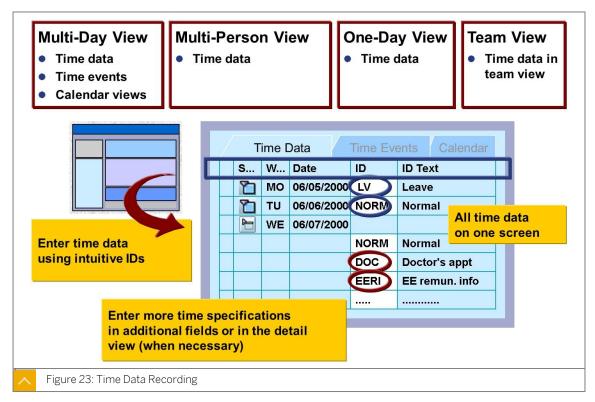
#### Online messages:

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This area is used for displaying messages or confirmations concerning time data entered by time administrators. These messages can be informational, warning, or error messages.

#### **Time Data Recording**





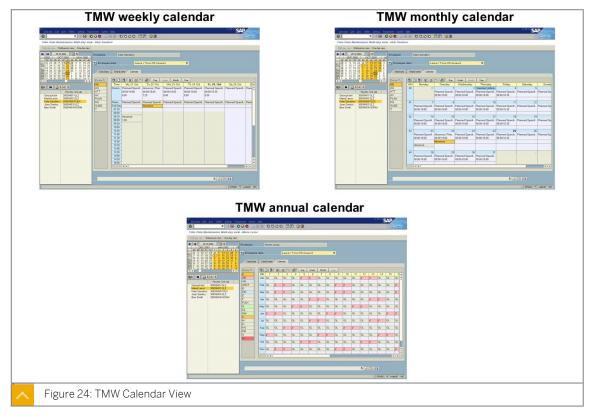
On the *Time Data* tab, as a time administrator, you can maintain all the time data for your employees without having to switch to different screens. This tab is available for all views (multi-day, multi-person, one-day, and team views).

You can enter and maintain all types of time data, such as attendances and absences, and changes in planned specifications, on the *Time Data* tab. On this tab, the dominant is the main activity for each day. The dominant includes the most important information for a particular day. For example, the time ID is usually displayed for the Personal Work Schedule (PWS) in the dominant. If an employee is off ill the time ID for this absence is displayed as the Dominant. The focus is on the employee's availability. If you collapse the time data for a specific day, only the dominant information for that day is displayed.

On the *Time Events* tab, as a time administrator, you can maintain and add to employees' time events. This tab is available only in the multi-day view.

#### **Calendar Views**





You can use a calendar view to display a graphical overview of an employee's time data (time entries and time events) for a relatively long period. You can choose a daily, weekly, monthly, or yearly calendar.

You can also maintain data in the calendar view. Color-coded time data IDs are displayed in a bar to the left of the calendar. You can move the IDs to the required days by using drag and drop. You can also edit these further by copying and pasting them. For example, you can copy the recurring attendances or absences to the appropriate days.



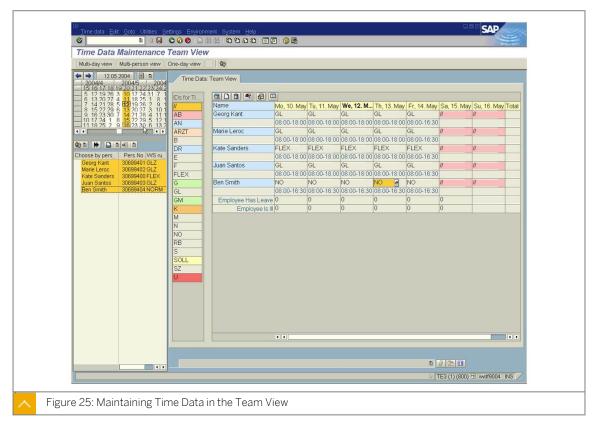
#### Note:

The new calendar views are part of the standard delivery for SAP ERP.

If you need to, you can create a customer message under the PT-RC-UI-TMW component.

#### **Team View**





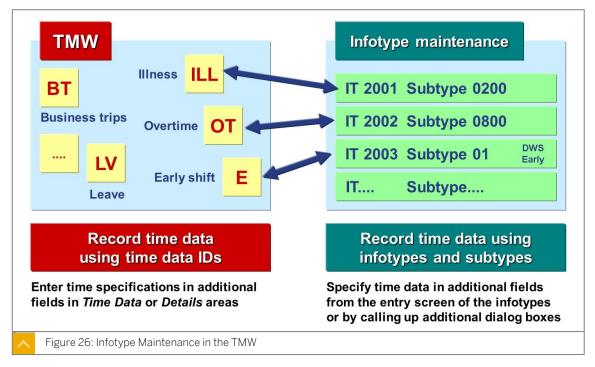
The team view provides an overview of the position and frequency of full-day and partial-day data for your entire team. This view provides a list-oriented color display of time data of multiple employees over a specified period. The different colors of the time data IDs enable you to note, at a glance, the position and frequency of the various shifts and to detect issues.

This view is useful for planning shifts and vacations for your team, because you have an overview of your team's full-day and multiple-day time data. To simplify the planning process, you can use a customer-specific Business Add-In (BAdI) to define additional rows and columns for the information you require. In addition, you can define rows with evaluations such as the number of employees on vacation.

For your day-to-day planning needs, you can also define a customer-specific row with evaluations; for example, the number of sick employees who are absent, or a shift counter that displays the number of early, late, or night shifts.

#### Infotype Maintenance in the Time Manager's Workplace





Time data is recorded using intuitive time data IDs, and is stored in individual time infotypes. IDs are defined in Customizing to represent each type of time data. For example, a time data ID such as "OT" can be defined for an attendance type to be valuated with an overtime compensation type (such as basic pay for time off) in Time Evaluation. The time data ID is assigned to the Attendance infotype (2002) and the subtype for this absence type in Customizing. The overtime compensation type is also defined for the time ID.

Time data entered in the TMW using time data IDs can be processed in the *Time Data Maintenance* transaction. Time data entered in the Time Data Maintenance transaction using time data IDs can also be processed in the TMW.

Time data IDs can also be generic, if the corresponding subtypes are not specified. If time administrators use a generic ID for time data, they are advised to specify more detailed information in the Details area.



#### LESSON SUMMARY

You should now be able to:

- · Outline employee time recording options
- Record employee time data

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# Unit 1

# **Learning Assessment**

1.	Recording of all working times including deviations is a characteristic of:  Choose the correct answer.
	A Positive time management  B Negative time management
2.	Shift Planning allows you to assign shift times, locations, type of personnel, and the number of required employees to optimally staff your enterprise.  Determine whether this statement is true or false.
	True False
3.	The infotype is used for determining whether and how employee time data is to be processed in Time Evaluation or Payroll.  Choose the correct answer.
	A Organizational Assignment (0001)  B Personal Data (0002)  C Time Recording Information (0050)  D Planned Working Time (0007)
4.	Time data is best maintained centrally in the SAP system by one administrator.  Determine whether this statement is true or false.  True
	False



5.	The Time Supervisor and Time Administrator roles can be carried out by the same person Determine whether this statement is true or false.
	True False
6.	The monitors employee time and labor data in relation to strategic company goals.  Choose the correct answer.
	A Time and Labor Analyst  B Shift Planner  C Time Supervisor
7.	The roles in Time Management help you to authorize different personnel to carry out certain activities in Time Management.  Determine whether this statement is true or false.
	True False
8.	Which of the following options for recording time data are available in the SAP system?  Choose the correct answers.
	<ul> <li>A Self-service</li> <li>B Infotype maintenance</li> <li>C Core flextime sheet</li> <li>D TMW</li> <li>E Clock in/out using WAP cell phone</li> </ul>
9.	Theallows you to post time events and time data through mobile devices Choose the correct answer.
	<ul> <li>□ A WAP</li> <li>□ B ESS application</li> <li>□ C TMW</li> <li>□ D CAT</li> </ul>

# Unit 1

### **Learning Assessment - Answers**

1.	Recording of all working times including deviations is a characteristic of:  Choose the correct answer.
	X A Positive time management  B Negative time management
2.	Shift Planning allows you to assign shift times, locations, type of personnel, and the number of required employees to optimally staff your enterprise.  Determine whether this statement is true or false.
	X True False
3.	The infotype is used for determining whether and how employee time data is to be processed in Time Evaluation or Payroll.  Choose the correct answer.
	A Organizational Assignment (0001)  B Personal Data (0002)  C Time Recording Information (0050)  X D Planned Working Time (0007)
4.	Time data is best maintained centrally in the SAP system by one administrator.  Determine whether this statement is true or false.  True
	X False



5.	The Time Supervisor and Time Administrator roles can be carried out by the same person. Determine whether this statement is true or false.
	X True False
6.	The monitors employee time and labor data in relation to strategic company goals.
	Choose the correct answer.
	X A Time and Labor Analyst
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	C Time Supervisor
7.	The roles in Time Management help you to authorize different personnel to carry out certain activities in Time Management.
	Determine whether this statement is true or false.
	X True
	False
8.	Which of the following options for recording time data are available in the SAP system?
	Choose the correct answers.
	X A Self-service
	X B Infotype maintenance
	C Core flextime sheet
	X D TMW
	X E Clock in/out using WAP cell phone

9.	Theallows you to post time events and time data through mobile devices.
	Choose the correct answer.
	X A WAP
	B ESS application
	C TMW
	D CAT

# **UNIT 2 Enterprise Structure and** Groupings

#### Lesson 1

**Outlining Structures in HCM** 

41

#### **UNIT OBJECTIVES**

- Outline the purpose of the enterprise structure
- Perform an organizational reassignment
- Review the purpose of control indicators
- Outline the purpose of grouping employees for Time Management
- Identify the set up of employee groupings



### Unit 2 Lesson 1

### **Outlining Structures in HCM**

#### **LESSON OVERVIEW**

This lesson describes the enterprise and personnel structures and explains the concept behind the groupings of personnel subareas and employee subgroups. The lesson also shows you how to move existing employees into another personnel subarea.

#### **Business Example**

You need to transfer employees to a different personnel subarea. For this reason, you require the following knowledge:

- An understanding of SAP ERP Human Capital Management (SAP ERP HCM) enterprise and personnel structures
- An understanding of how to perform an organizational reassignment
- An understanding of the purpose of control indicators and groupings for employees
- An understanding of the Customizing steps for personnel subareas and employee subgroups



#### **LESSON OBJECTIVES**

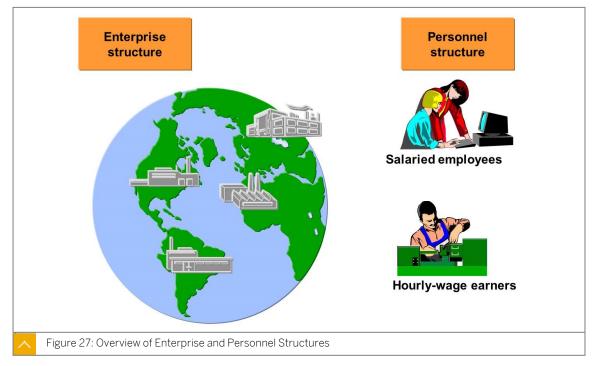
After completing this lesson, you will be able to:

- Outline the purpose of the enterprise structure
- Perform an organizational reassignment
- Review the purpose of control indicators
- · Outline the purpose of grouping employees for Time Management
- Identify the set up of employee groupings



### **Enterprise Structure**





Each employee must be uniquely categorized to fit into the enterprise and personnel structures. For example, an employee who works in Sales Office I as a salaried employee belongs to the enterprise structure for Sales Office I and is part of the personnel structure for a salaried employee.

Each employee is assigned to an enterprise and personnel structure in the Organizational Assignment infotype (0001). This infotype must be created for every employee.

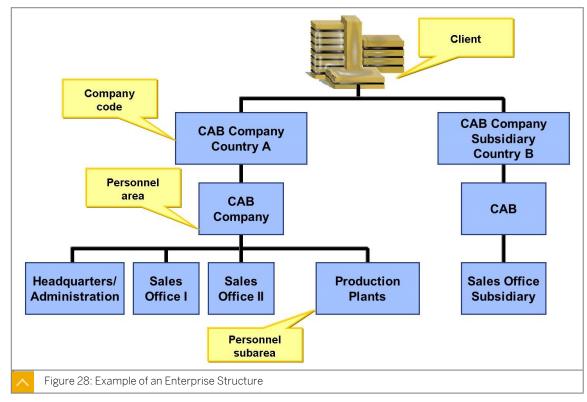


#### Note:

The enterprise and personnel structures are set up in Customizing.

#### **Example of an Enterprise Structure**





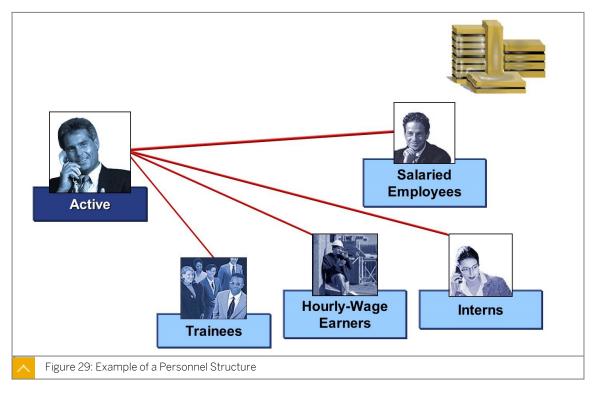
### The enterprise structure for Personnel Administration (PA) is determined by the following elements:

- Client
- · Company code
- Personnel area
- Personnel subarea

The company code is defined in Financial Accounting (FI). The balance of accounts required by law and the profit and loss statements are created at the company code level. The personnel area is unique within the client and is used exclusively in PA. Each personnel area must be assigned to a company code. The groupings that determine which settings can be used for an employee of a certain company code and personnel area are linked to the personnel subarea. The personnel subarea is used exclusively in PA.

#### **Personnel Structure**





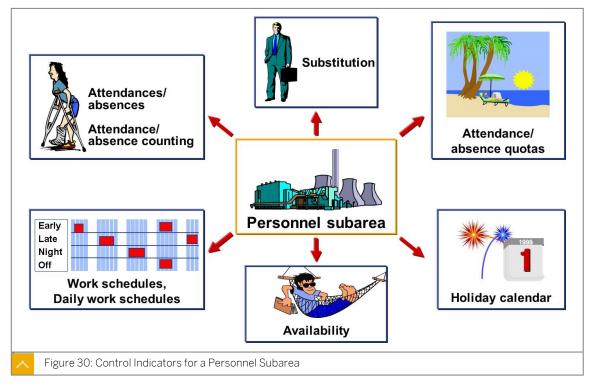
An employee group divides employees according to their working relationship in the enterprise (active, pensioner, early retiree, and so on).

An employee subgroup is a more specific division of the employee group based on the status of an employee. For example, in the figure, salaried employees and hourly-wage earners are subgroups of the active employee group.

All the control features of the personnel structure are defined at employee subgroup level.

### **Personnel Subarea: Control Indicators**



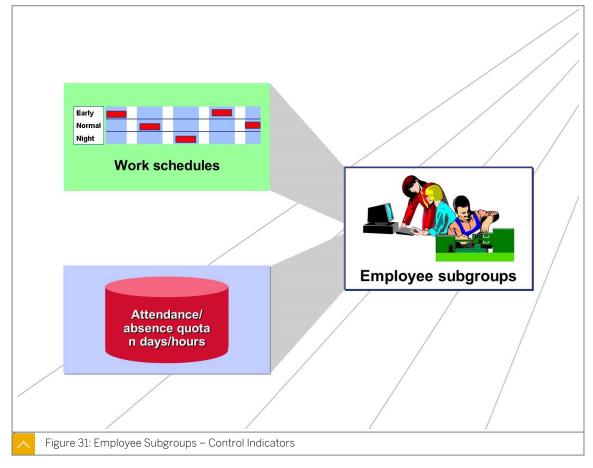


### The control indicators determined by the personnel subarea for Time Management are as follows:

- Assignment of a public holiday calendar to a personnel subarea
- Personnel subarea groupings for:
  - Work schedules
  - Attendance and absence types
  - Substitution types and availability types
  - Attendance and absence counting
  - Time quotas
  - Time recording

### **Employee Subgroups - Control Indicators**



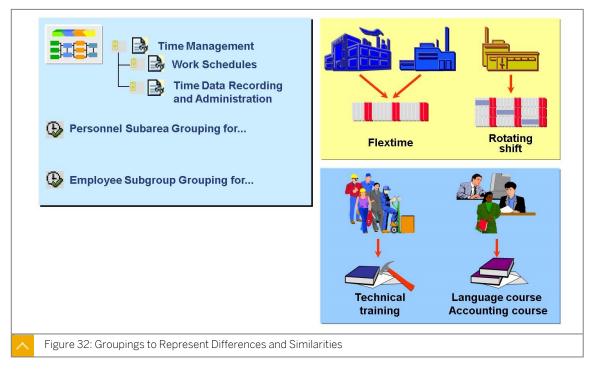


### The control indicators determined by the employee subgroup for Time Management are as follows:

- Employee subgroup grouping for work schedules
- Employee subgroup grouping for time quotas

### **Employee Groupings**





Similarities and differences between personnel subareas or between employee subgroups based on their Time Management aspects are represented by groupings in the system.

All the personnel subareas that are handled in the same way for one time management aspect are assigned to a grouping. For example, all personnel subareas that have the same work schedules are assigned to a grouping. If any Time Management aspect is different for a personnel subarea, the personnel subarea is assigned to a different grouping.

By grouping personnel subareas or employee subgroups, you can reduce the amount of time and effort spent on maintenance. For example, the permitted work schedules need to be stored only once for a grouping of personnel subareas or a grouping of employee subgroups. You control permissions on the basis of the groupings. For example, the only work schedules permitted for a personnel area are those of the grouping to which the personnel subarea is assigned.

Groupings are assigned at various points in Customizing for Time Management.

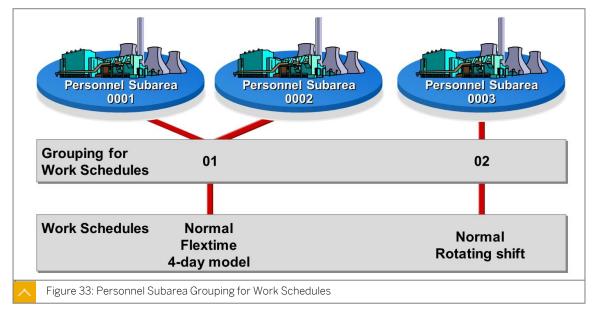


#### Note:

Groupings are used not only in Time Management, but also in other SAP components, such as Personnel Administration and Payroll.

#### **Personnel Subarea Groupings**





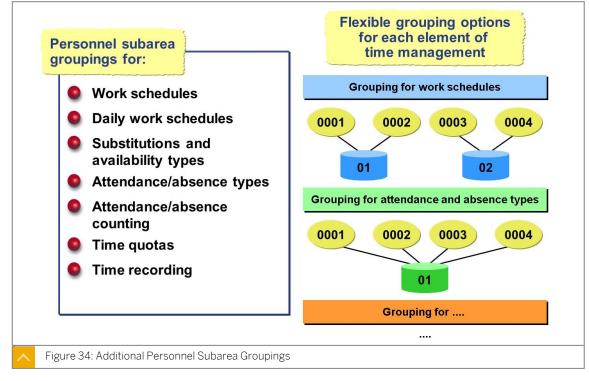
A personnel subarea grouping for work schedules is a group of personnel subareas to which the same work schedule rules apply. This grouping allows you to control whether a work schedule is permitted within the personnel subareas.

Several groupings are required if different work schedule rules apply to different personnel subareas. For example, employees in your personnel subareas 0001 and 0002 work according to the normal, flextime, and 4-day working time models. Employees in your personnel subarea 0003 work according to the normal and rotating shift working time models. The work schedules valid for personnel subareas 0001 and 0002 are not permitted in personnel subarea grouping 0003. The work schedules valid for personnel subarea 0003 are not permitted for personnel subareas 0001 and 0002.

Work schedule rules assigned to different groupings can have the same name.

#### **Additional Groupings**





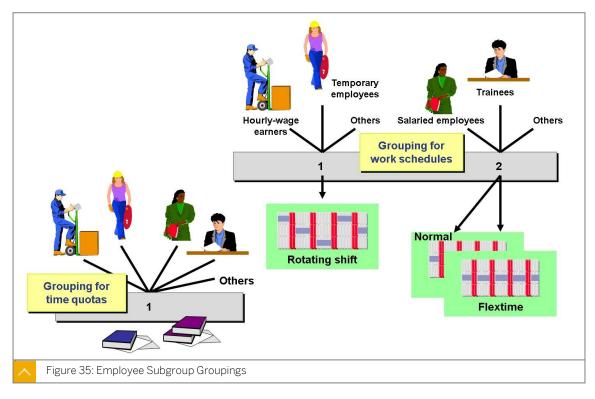
Personnel subareas can be regrouped for different Time Management aspects. Groupings are only based on one individual Time Management aspect, and remain independent of each other.

Consider the example shown in the figure. In this example, one set of work schedules is valid for personnel subareas 0001 and 0002 and another set of work schedules applies for personnel subareas 0003 and 0004. Personnel subareas 0001 and 0002 are therefore assigned to grouping 01 for work schedules, and personnel subareas 0003 and 0004 are assigned to grouping 02 for work schedules.

All attendance and absence types are permitted for the employees in all personnel subareas. Because you do not want to differentiate between individual personnel subareas for the attendance and absence types, all personnel subareas are assigned to only one grouping, *O1*. This grouping includes all the attendance and absence types that apply in the company.

#### **Employee Subgroup Groupings**





The same principle that applies to personnel subarea groupings for certain Time Management aspects, such as work schedules and time quotas, also applies to employee subgroup groupings.

You define employee subgroup groupings for work schedules and time quotas (absence entitlements, attendance approvals). The standard system contains the groupings 1 (hourly-wage earners) and 2 (salaried employees). You assign the relevant grouping to the individual employee subgroups.

Consider the following example: The work schedules for hourly-wage earners and salaried employees differ. Certain work schedules are permitted only for salaried employees, and other work schedules are only permitted for hourly-wage earners. You, therefore, set up one grouping for salaried employees and one for hourly-wage earners.

In the standard system, time quotas, such as absence entitlements and attendance approvals, are handled in the same way for all employee subgroups. The value  $\boldsymbol{1}$  is assigned as the grouping for time quotas to all employee subgroups.

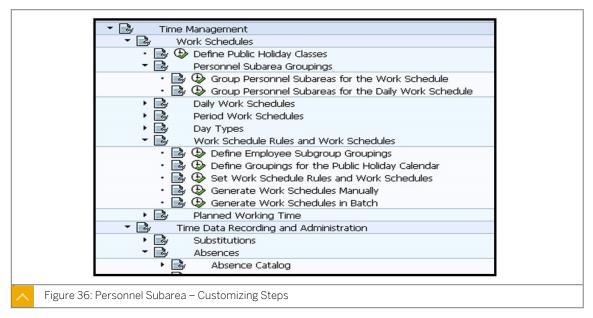
#### **Employee Groupings: Customizing**

Customizing for Time Management contains an overview of all the groupings.

You need to generate a project for Personnel Time Management, or a project that at least contains the Time Management component. With this project, you can generate a view for the Customizing activities required for personnel subareas and a view for the steps required for employee subgroups.

#### Personnel Subareas - Customizing





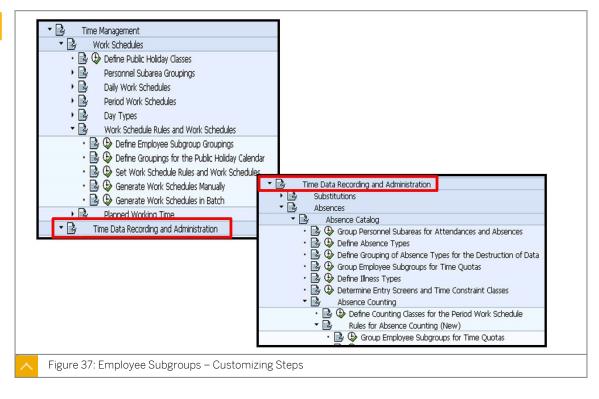
Indicators are assigned to personnel subarea groupings to control different aspects of Time Management for the different groups.

For example, in Customizing, personnel subareas which are permitted to use the same work schedules are assigned to the same grouping. Similarly, personnel subareas which are permitted to use the same work schedule rules and work schedules are assigned to the same grouping.

In addition, personnel subareas are also grouped for different aspects of time data recording and administration (for example, substitutions and absences). These groupings are maintained in Customizing as indicated in the figure. These tables provide an overview of the personnel subareas and the groupings they are assigned to.

#### **Employee Subgroups - Customizing**





Indicators are assigned to employee subgroups to control different aspects of Time Management for each employee subgroup.

For example, in Customizing, employee subgroups which are permitted to use the same time quotas are the same grouping. These groupings are maintained in Customizing as indicated in the figure. These tables provide an overview of the employee subgroups and the groupings they are assigned to.



#### **LESSON SUMMARY**

You should now be able to:

- Outline the purpose of the enterprise structure
- · Perform an organizational reassignment
- Review the purpose of control indicators
- Outline the purpose of grouping employees for Time Management
- Identify the set up of employee groupings

# Unit 2

# **Learning Assessment**

1.	Which of the following elements form part of an enterprise structure?
	Choose the correct answers.
	A Job
	B Client
	C Company code
	D Organizational unit
2.	You can use the employee subgroup to specify control indicators for grouping work schedules.
	Determine whether this statement is true or false.
	True
	False
3.	Which of the following areas are controlled by grouping personnel subareas for Time Management?
	Choose the correct answers.
	A Work schedule
	B Attendance and absence types
	C Master data for Time Management
	D Time quotas



# **Learning Assessment - Answers**

1.	Which of the following elements form part of an enterprise structure?
	Choose the correct answers.
	A Job
	X B Client
	X C Company code
	D Organizational unit
2.	You can use the employee subgroup to specify control indicators for grouping work schedules.
	Determine whether this statement is true or false.
	X True
	False
3.	Which of the following areas are controlled by grouping personnel subareas for Time Management?  Choose the correct answers.
	X A Work schedule
	X B Attendance and absence types
	C Master data for Time Management
	X D Time quotas

Lesson 1

Lesson 7

Lesson 8

# **UNIT 3** Work Schedule

### Identifying Public Holiday Calendars 57 Lesson 2 Defining Work Schedule Levels and Groupings 63 Lesson 3 Creating Break Schedules 67 Lesson 4 Creating Daily Work Schedules 71 Lesson 5 Setting Up Period Work Schedules 77 Lesson 6

### **UNIT OBJECTIVES**

Identifying Day Types and Selection Rules

Creating Work Schedule Rules

Generating Work Schedules

- Identify the set up of public holiday calendars
- · List the different work schedule levels
- Outline how personnel subarea groupings are used to determine the assignment of work schedule rules
- Create break schedules to accommodate employees working different shifts



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83

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- Create a daily work schedule
- Set up a period work schedule
- Identify day types and selection rules
- Create work schedule rules to be assigned to employees
- Generate work schedules to set up work hours for employees

### **Identifying Public Holiday Calendars**

#### **LESSON OVERVIEW**

This lesson explains the setup of public holiday calendars.

#### **Business Example**

To create a work schedule for employees, you must first set up a public holiday calendar that indicates the public holidays of the country, region, and city. For this reason, you require the following knowledge:

- An understanding of public holidays and public holiday calendars
- An understanding of the assignment of public holiday calendars
- An understanding of public holiday classes



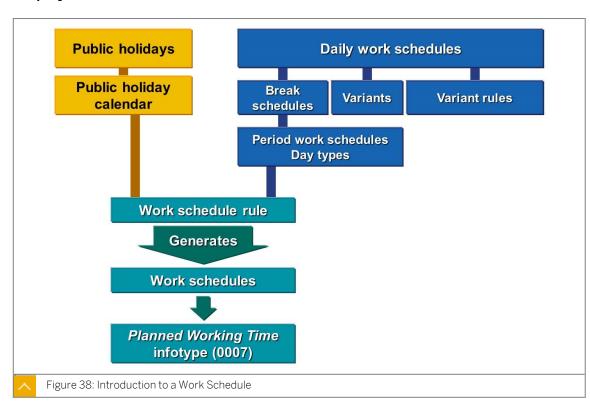
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

· Identify the set up of public holiday calendars

#### **Employee Work Schedules**







To set up Time Management, you must define a valid public holiday calendar with the applicable public holidays and a valid work schedule.

A work schedule consists of individual elements, such as a public holiday calendar, break schedules, variants, and variant rules. After the individual elements are defined, they are combined in a work schedule rule. A work schedule is then generated on the basis of the rule.

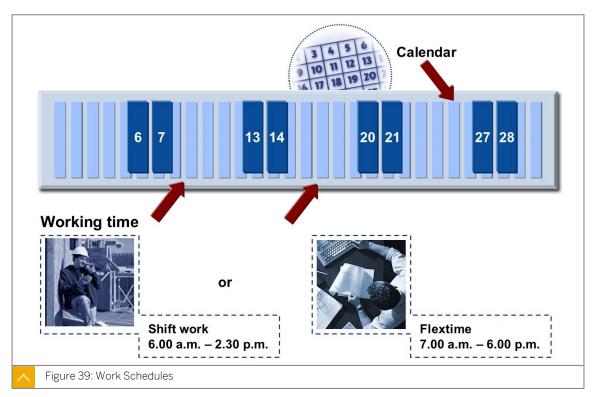
A generated work schedule is assigned to employees in the *Planned Working Time* (0007) infotype using the work schedule rule. Work schedules must be created to reflect employee working time.

A public holiday calendar defines the public holidays applicable to employees, and a work schedule defines work patterns for diverse groups of employees in a company.

A public holiday calendar is relevant for payment because if employees work on a public holiday, they may get overtime payments. If an employee takes leave over a period that includes a public holiday, the public holiday may be counted as leave and deducted from the leave entitlement.

#### **Work Schedules**



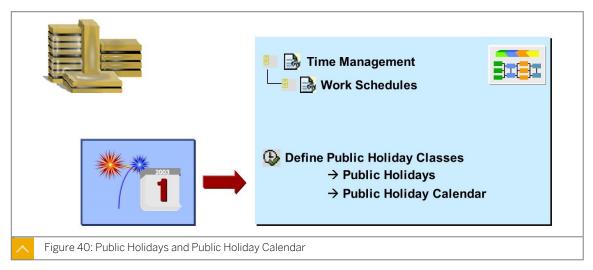


The central element in Time Management is the employee's work schedule.

The work schedule contains planned specifications of an employee's working time, including breaks. The work schedule is based on a valid public holiday calendar.

#### **Public Holiday Calendar**



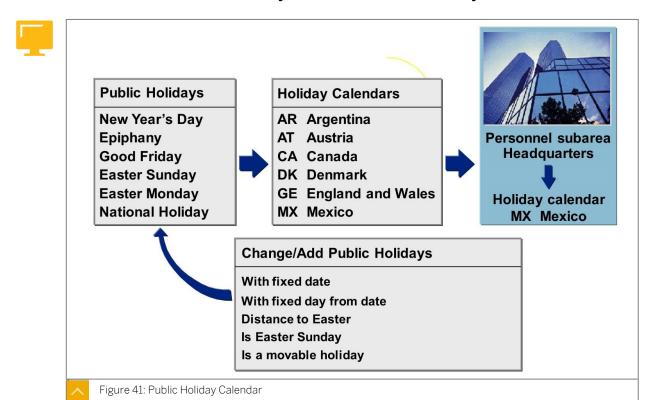


Different countries, regions, and cities have different public holidays. For this reason, in Time Management, public holidays are grouped together in public holiday calendars. A valid public holiday calendar, including the applicable public holidays, is a prerequisite for setting up a work schedule. The factory calendar is not significant.

Public holidays and public holiday calendars can be modified to suit regional and companyspecific requirements.

You maintain public holidays and public holiday calendars under either *Work Schedules* or *General Settings* in Customizing for Time Management.

#### Characteristics of a Public Holiday Calendar and a Public Holiday



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ved.

Every work schedule is based on a valid public holiday calendar that includes all regional public holidays.

The standard system contains a sample list of public holidays and public holiday calendars. You can define new public holidays and include them in a public holiday calendar. You can modify or remove existing holidays from the calendar, and can also remove public holiday calendars that are not used.

#### A public holiday calendar has the following characteristics:

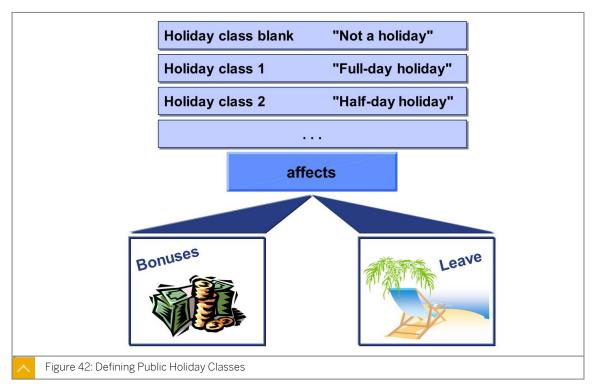
- The validity of a public holiday calendar is specified by a validity period.
- A public holiday calendar is assigned to a personnel subarea.
- Public holidays are set up once and can then be incorporated in various calendars.

#### A public holiday can have one of the following characteristics:

- Fixed date
- · Specific distance to Easter
- · Specific date and weekday
- · Without a fixed date

#### **Public Holiday Classes**





Public holidays are grouped into public holiday classes in Human Resources. The public holiday class is used for selecting time wage types, daily work schedule variants, day types, and for absence counting.

In the standard system, public holiday class 1 is assigned to full-day public holidays and public holiday class 2 is assigned to half-day public holidays.

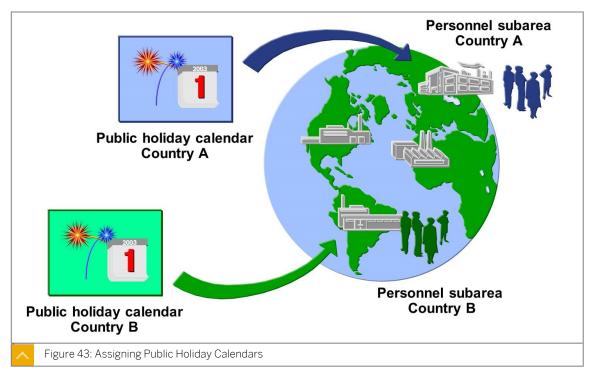
Not all public holidays are treated in the same way. Some collective agreements stipulate different holiday bonuses for working on certain public holidays, such as on May 1. If you want

to treat a public holiday differently, you can assign it a different public holiday class. You can use a value from 0 to 9 for the public holiday class; 0 or blank is used for days that are not public holidays.

Certain public holidays may only be relevant in specific religions, that is, the public holiday is observed only by employees of a particular religious group.

#### **Public Holiday Calendar Assignments**





Each personnel area or personnel subarea must be assigned a unique public holiday calendar that is valid for the corresponding region (country, state, city, and so on).

Before you can assign holidays, you must first create the public holiday calendar and the personnel areas and subareas. The public holiday calendar that is valid for an employee depends on the personnel area or personnel subarea to which the employee is assigned. For example, the personnel subarea 0001 refers to a plant in Argentina and is assigned the public holiday calendar AR (for Argentina). The personnel subarea 0002 refers to a plant in Bavaria, Germany, and is assigned the public holiday calendar 07.



#### LESSON SUMMARY

You should now be able to:

• Identify the set up of public holiday calendars

### Unit 3 Lesson 2

### **Defining Work Schedule Levels and Groupings**

#### **LESSON OVERVIEW**

This lesson shows you how work schedule patterns are set up in a work schedule.

#### **Business Example**

You need to create a work schedule for your employees. For this reason, you require the following knowledge:

- An understanding of work schedule levels
- An understanding of personnel subarea groupings for work schedules



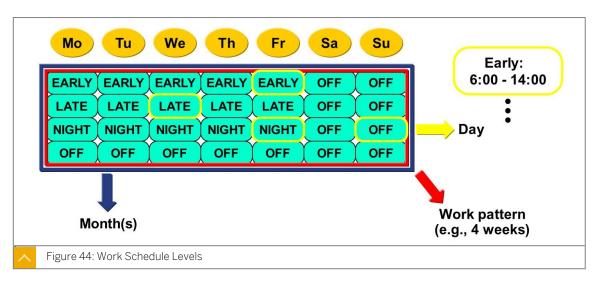
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

- · List the different work schedule levels
- Outline how personnel subarea groupings are used to determine the assignment of work schedule rules

#### Work Schedule Levels





Work schedules define the work patterns for groups of employees and include working times. A valid public holiday calendar is a prerequisite for every work schedule.

Specifications for work schedules are stored at three levels. The work schedule levels are as follows:

Daily level:



At the daily level, daily work schedules including the break schedule are specified. You can also include various daily work schedule variants (alternative versions of the daily work schedules).

#### Weekly level:

At the weekly level, daily work schedules are arranged into a specific pattern in period work schedules.

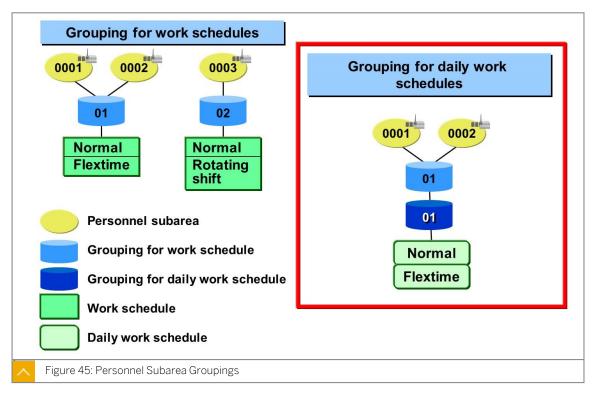
#### Monthly level:

At the monthly level, work schedules are created for several calendar months based on a valid public holiday calendar and a work schedule rule.

Work schedules can apply to one or more personnel subarea or employee subgroup groupings.

#### Personnel Subarea Groupings for Work Schedules





A personnel subarea grouping for work schedules is a group of personnel subareas that have the same work schedule rules. This grouping allows you to control the permissibility of work schedules within the personnel subareas. Several groupings are required if different work schedule rules apply to different personnel subareas.

A personnel subarea grouping for daily work schedules is a group of personnel subareas that base their daily work schedules on the same work schedules. This grouping is not assigned directly to the personnel subarea but is assigned to the grouping for work schedules. A personnel subarea grouping for daily work schedules can be assigned to one or more groupings for work schedules. In this way, the permissibility of daily work schedules used is controlled within personnel subareas.

In the example shown in the figure, personnel subareas 0001 and 0002 use the same work schedules and are, therefore, assigned to the same grouping for work schedules (01). Consequently, they also use the same daily work schedules and are assigned to the same grouping for daily work schedules (01).



#### Note:

The groupings for daily work schedules 01 to 50 are reserved for use in Time Management.



## **LESSON SUMMARY**

You should now be able to:

- List the different work schedule levels
- Outline how personnel subarea groupings are used to determine the assignment of work schedule rules

# Unit 3 Lesson 3

# **Creating Break Schedules**

#### **LESSON OVERVIEW**

This lesson shows you how to create break schedules.

#### **Business Example**

As a time administrator, you are responsible for setting up work schedules and break schedules. Employees in your company have different break schedules, and you must incorporate them into the work schedules. For this reason, you require the following knowledge:

- An understanding of break schedules
- An understanding of how to create break schedules to accommodate employees working different shifts



### **LESSON OBJECTIVES**

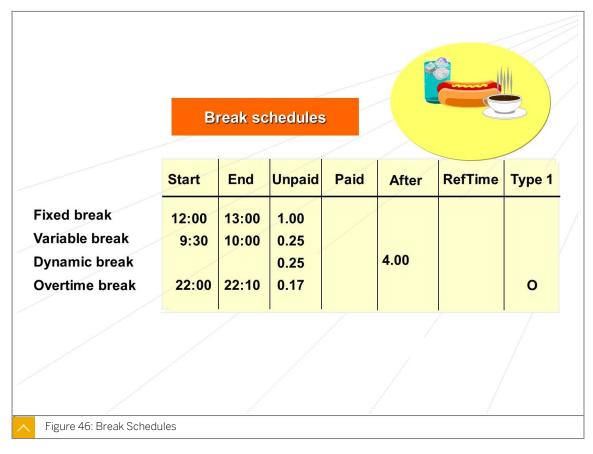
After completing this lesson, you will be able to:

• Create break schedules to accommodate employees working different shifts



#### **Break Schedules**





Breaks are periods of time during the workday when employees are not required to work.

The break schedule defines the rules governing breaks in a workday. The break schedule is assigned to a personnel subarea grouping for daily work schedules. You can assign a break schedule to as many daily work schedules as you require.

### The different types of breaks defined in Time Management are as follows:

#### Fixed breaks:

These are breaks that employees can take at a certain time (for example, from 09:00 to 09:15).

#### Variable breaks:

These are breaks that employees can take at any time within a specific interval. Employees can determine the time when their break begins and ends (for example, an hour break to be taken between 12:00 and 14:00).

#### Dynamic breaks:

These are breaks that employees can take after a certain number of hours are worked (for example, a 15-minute break must be taken after working for 4 hours). In the *RefTime* (reference time) field in the flextime working models, you can specify if a dynamic break is to be calculated from the start of planned working time or from the start of normal working time. The start of planned working time is the default setting in the standard system. Dynamic breaks can be defined in more detail in the DYNBR function in Time Evaluation.

#### Overtime breaks:

These are breaks that employees can take when working overtime. To specify a break type as overtime, you need to enter O in the *Type 1* column.

You assign breaks taken after midnight during night shifts to the previous day by activating the previous-day indicator in the P field.

If break schedules change after they are assigned to work schedules, you must revaluate the applicable daily work schedules. You can manage your work schedules in Customizing by choosing  $Time\ Management \rightarrow Work\ Schedules \rightarrow Work\ Schedule\ Annually$ .



#### **LESSON SUMMARY**

You should now be able to:

• Create break schedules to accommodate employees working different shifts

# Unit 3 Lesson 4

# **Creating Daily Work Schedules**

#### **LESSON OVERVIEW**

This lesson shows you how to set up work schedule rules.

#### **Business Example**

As a time administrator, you need to set up and assign work schedule rules to create work schedules for your employees. For this reason, you require the following knowledge:

- An understanding of work schedule rules
- An understanding of how to create work schedule rules



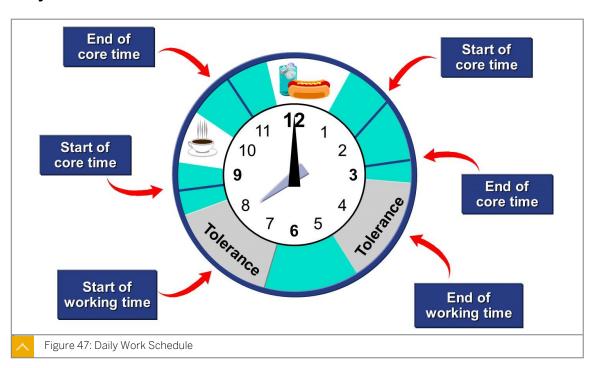
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

· Create a daily work schedule

### **Daily Work Schedules**





A daily work schedule is a description of the duration and location of working time for an employee on any given workday. A daily work schedule contains the specifications for a workday.



#### The specifications include the following elements:

- · The start and end of working time
- Planned working hours
- Scheduled breaks
- · Whether general overtime approvals are permitted

You can also add variants to a daily work schedule to create, for example, a shortened version of the daily work schedule. These versions are called daily work schedule variants. A daily work schedule variant can be used, for example, when employees work a reduced schedule prior to a public holiday, or on a half-day working day such as a Saturday. In the daily work schedule definition, you can specify whether or not these alternative versions of the daily work schedule are to be used.

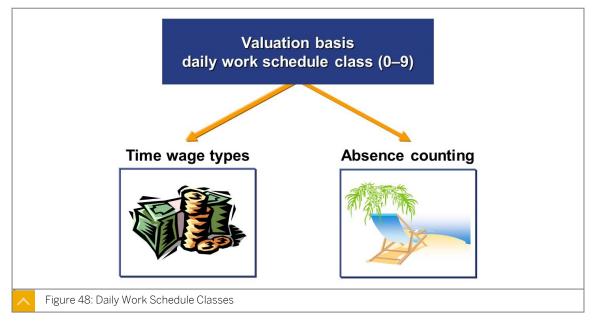
Daily work schedules can contain predefined, fixed working hours or flexible working hours (flextime work schedules).

Flextime work schedules contain a period of time within which employees may clock in and clock out (where actual times are recorded). You can also define core hours for flextime work schedules. Core hours are the specific hours when employees are required to be at work.

Daily work schedules can also contain begin and end tolerances. This prevents clock-in or clock-out hours that differ only slightly from the normal start or end of working time from being interpreted as overtime or working time violations.

#### **Daily Work Schedule Classes**



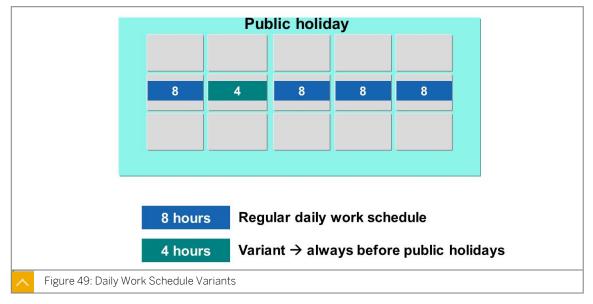


A daily work schedule class is assigned to a daily work schedule, which is used as the valuation basis for the daily work schedule. Daily work schedule classes specify the conditions and rules for generating time wage types, and determine how absences and attendances are counted.

The *No planned working hours* checkbox is used to indicate daily work schedules containing days off. You can assign daily work schedule classes 0–9, to distinguish between the individual work schedules.

### **Daily Work Schedule Variants**



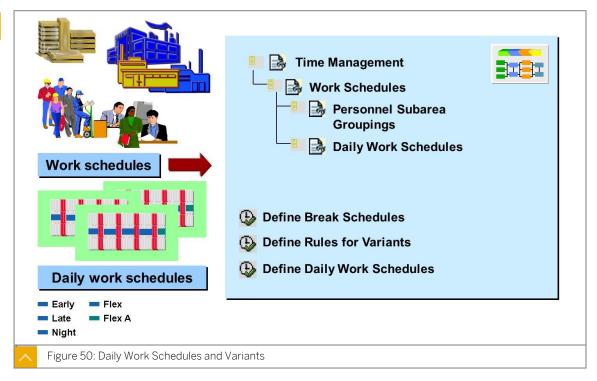


A daily work schedule variant is an alternative version of a daily work schedule. It has the same name as the original daily work schedule. However, it has an additional indicator, a letter or a number, which distinguishes it from the corresponding daily work schedule.

Daily work schedule variants can be included automatically when the system generates the monthly work schedules. To do so, you define rules that determine the conditions to be met so that the daily work schedule variant can be used on a specific day, such as on a day preceding a public holiday. For example, employees with flexible working hours – who work Monday through Friday according to the daily work schedule FLEX – work fewer hours than usual prior to public holidays. This scenario can be set up by using a daily work schedule variant. The daily work schedule variant in this example must be called FLEX. It must include an additional indicator, such as FLEX B or FLEX 1, to distinguish it from the regular daily work schedule.

#### **Daily Work Schedules and Variants**





Because some employees work a reduced schedule prior to public holidays, you must also define alternative versions of the daily work schedules, known as daily work schedule variants.

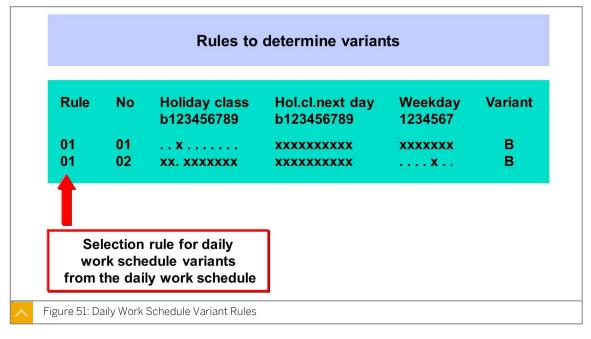
The conditions upon which the variants depend are defined in specific rules.

The smallest unit of the work schedule is the daily work schedule, which contains information on the individual work days. This information includes breaks and daily work schedule variants.

You set up the daily work schedules in Customizing for Time Management under Work Schedules → Daily Work Schedules.

#### **Daily Work Schedule Variant Rules**





Rules for daily work schedule variants are indicated by a two-digit number (rule). The daily work schedule specifies the selection rule that is used to determine the daily work schedule variant. Therefore, a rule must already exist.

A rule can be assigned to several daily work schedules. Corresponding variants must exist for these daily work schedules – such as FLEX B and NORM B.

If a rule is applicable, the daily work schedule variant for the corresponding day (the current day) is referenced when the work schedule is generated.

# Rules are defined for daily work schedule variants depending on the following characteristics:

- The public holiday class of the current day
- The public holiday class of the following day
- The day of the week (for the current day)

A rule may contain several subrules. All subrules of the rule are run through sequentially until one of them applies. If no subrule is applicable, a daily work schedule variant is not referenced. In the example shown in the figure, the rule 01 variant consists of two subrules: 01 and 02.

According to subrule 01, a daily work schedule with variant B is referenced when the current day is a half-day public holiday (public holiday class 2). This occurs regardless of whether the following day is a public holiday (not depending on the public holiday class), and regardless of the day of the week for the current day.

According to subrule 02, a daily work schedule with variant B is referenced when the current day is not a half-day public holiday (all public holiday classes except 2 are selected). This occurs regardless of whether the following day is a public holiday (not depending on the public holiday class), and if the current day is a Friday (day 5).



# **LESSON SUMMARY**

You should now be able to:

• Create a daily work schedule

# Unit 3 Lesson 5

# **Setting Up Period Work Schedules**

#### **LESSON OVERVIEW**

This lesson shows you how to set up period work schedules.

#### **Business Example**

As a time administrator, you are responsible for work schedules. To complete the setup of the work schedules, you need to set up period work schedules. For this reason, you require the following knowledge:

• An understanding of how to set up a period work schedule



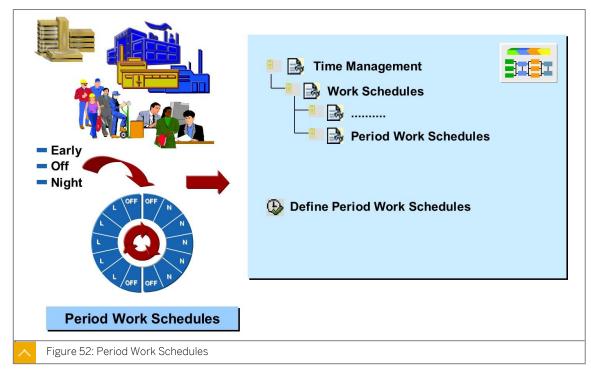
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Set up a period work schedule

### **Period Work Schedules**





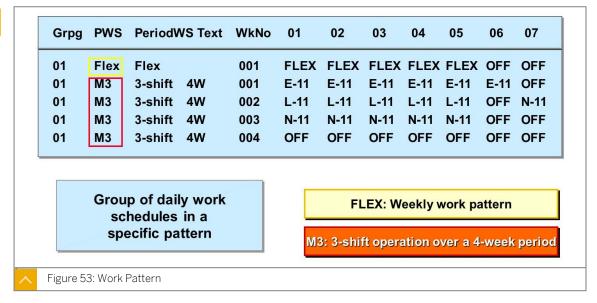
Employees work according to various work patterns. For example, some work during the same working hours and on the same days every week, while others work during different working hours on different weeks. Some employees work on weekends; others do not.

A period work schedule represents a working time pattern through a corresponding sequence of daily work schedules. A period work schedule is the basis for generating a work schedule.

To set up period work schedules, in Customizing, choose *Time Management*  $\rightarrow$  *Work Schedules*  $\rightarrow$  *Period Work Schedules*  $\rightarrow$  *Define Work Schedules*.

#### Work Pattern





A period work schedule consists of a sequence of daily work schedules representing a certain work pattern. A period work schedule can cover one week, more than one week or part of a week. The period work schedule is applied to a horizontal time axis (a valid public holiday calendar) that is then repeated continuously over a period of time. The pattern defined in the period work schedule repeats itself continuously.

The personnel subarea grouping for daily work schedules is a group of personnel subareas that use the same daily work schedules, period work schedules, and break schedules.



### **LESSON SUMMARY**

You should now be able to:

• Set up a period work schedule

# **Identifying Day Types and Selection Rules**

#### **LESSON OVERVIEW**

This lesson shows you how to review day types and selection rules.

#### **Business Example**

As a time administrator, you must ensure employee time is processed correctly. To do this, you need to review the day types that are used to determine whether or not employees must work on a specific day, and whether or not they are paid. For this reason, you require the following knowledge:

- An understanding of day types
- An understanding of selection rules
- An understanding of special days
- An understanding of how to review day types and selection rules



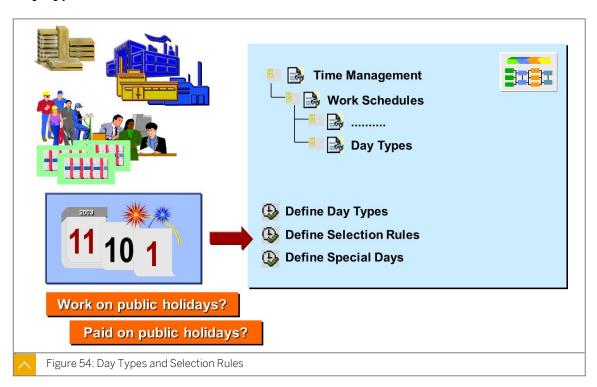
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Identify day types and selection rules

### **Day Types**







Day types are used to determine whether employees have to work on public holidays, and whether they are still paid on these days.

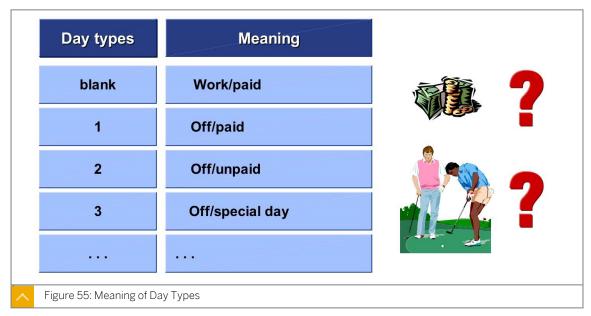
Some employees may work on public holidays, for example, employees in the production plant. However, some employees do not work on public holidays, but have paid days off, for example, salaried employees at headquarters and in administration.

Public holidays on working days, Saturdays, and Sundays can be handled differently for various employee groups. Day types are used to determine whether or not employees must work on a specific day, and whether or not they are paid.

You set up day types in Customizing for Time Management under Work Schedules  $\rightarrow$  Day Types.

#### **Definition of Day Types**





The day type determines payment as well as planned absences and attendance for a specific calendar day in the work schedule. The day type is necessary for absence counting and for wage type selection.

#### The standard SAP system contains the following day types:

#### blank:

This day type refers to a day on which an employee works and is paid.

1: This day type refers to a day on which an employee does not work, but is still paid.

2: This day type refers to a day on which an employee does not work and is not paid.

This day type refers to a day on which an employee does not work and is not paid.

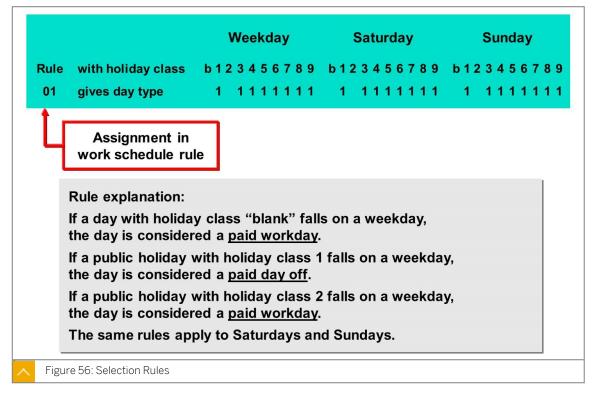
3:

This day type refers to a special day on which an employee does not work and is paid according to payroll rules.

In the work schedule, the day type determines whether employees must work on a specific day and whether or not they are paid.

#### **Selection Rules**





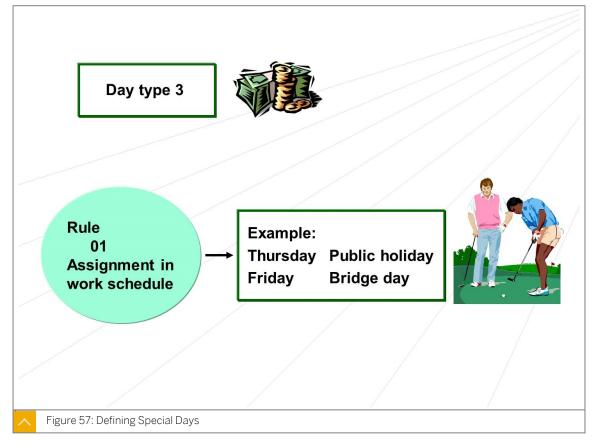
Day types are assigned to individual calendar days using selection rules for day types.

The day type is determined by the day of the week (weekday, Saturday, or Sunday) and by the public holiday class for that day of the week.

Selection rules are indicated by a number (rule). The work schedule rule specifies which rule is used to determine the day type.

#### **Special Days**





Special days are days that are not public holidays, and these days are handled differently. Special days include, for example, bridge days immediately before or after a public holiday, that is, days on which a group of employees might be off work.

Special days are indicated by day type 3 in the standard SAP system. A special day is defined by a specific date. The applicable day type for special days is assigned directly, regardless of the day of the week or the public holiday class. This date is assigned to a selection rule for day types. One or more special days can be defined for each selection rule.

The selection rule for day types (including the specification of special days) is assigned to the work schedule rule.

You need to determine the payment for special days in Payroll.



#### **LESSON SUMMARY**

You should now be able to:

Identify day types and selection rules

# Unit 3 Lesson 7

# **Creating Work Schedule Rules**

#### **LESSON OVERVIEW**

This lesson shows you how to set up work schedule rules.

#### **Business Example**

As the time administrator, you are responsible for the set up of employee work schedules. To set up these schedules, you require the following knowledge:

An understanding of work schedule rules



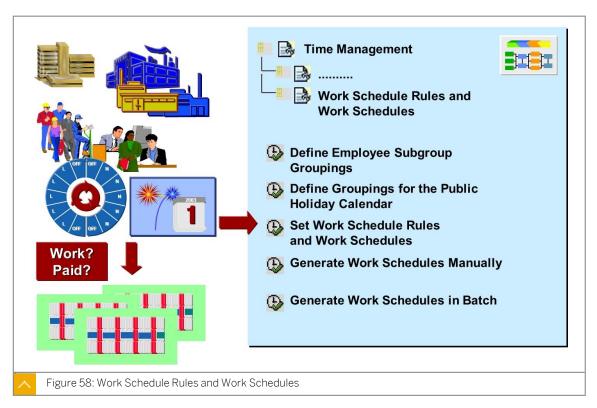
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Create work schedule rules to be assigned to employees

#### Work Schedule Rules





After the individual elements have been set up for work schedules, you can define work schedule rules. Work schedules can then be generated and assigned to employees.

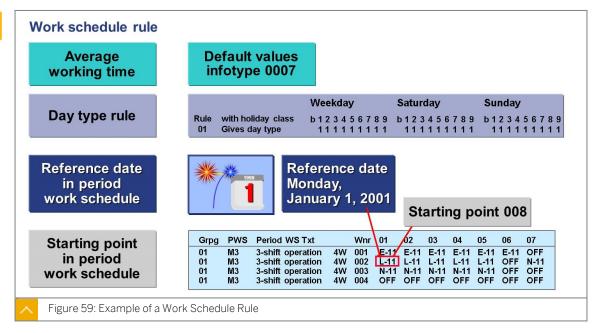
You can store various rules relating to work on public holidays in the work schedule rule. This is determined by the selection rules for day types.



You define work schedule rules and generate monthly work schedules in Customizing for Time Management under Work Schedules  $\rightarrow$  Work Schedule Rules and Work Schedules.

#### Example of a Work Schedule Rule





The work schedule rule contains employees' average working times.

You can store various rules relating to work on public holidays in the work schedule rule. This is determined by the selection rules for day types. Day types specify whether or not employees must work on public holidays, and whether they are paid for the work.

To apply the period work schedule to the public holiday calendar, you must enter two pieces of information in a work schedule rule.

#### The information required in a work schedule rule is as follows:

#### Reference date:

The reference date is the date on which the period work schedule is to start. We recommend you use a reference date that falls on a Monday.

#### Starting point:

The starting point is the position in the period work schedule at which the reference date is set.

For example, if you choose January 1, 2001 (a Monday) as the reference date, and 008 (8th day in the period work schedule) as the starting point, the late shift applies on January 1. The days before and after this reference date, are assigned an applicable daily work schedule once the period work schedule is applied.

Several work schedule rules can be based on one period work schedule. You can use a period work schedule for as many public holiday calendars as required. When the system generates the work schedule, it references the public holiday calendar stored in the work schedule rule. You can use one period work schedule for different work schedule rules in rotating shifts. To do so, you only have to move the starting point by one week, or as required (starting point 001, 008, and so on).



# LESSON SUMMARY

You should now be able to:

• Create work schedule rules to be assigned to employees



# Unit 3 Lesson 8

# **Generating Work Schedules**

#### **LESSON OVERVIEW**

This lesson shows you how to generate work schedules.

#### **Business Example**

You need to define planned working time for individual employees through work schedules. For this reason, you require the following knowledge:

- An understanding of how to generate work schedules
- An understanding of planned working time



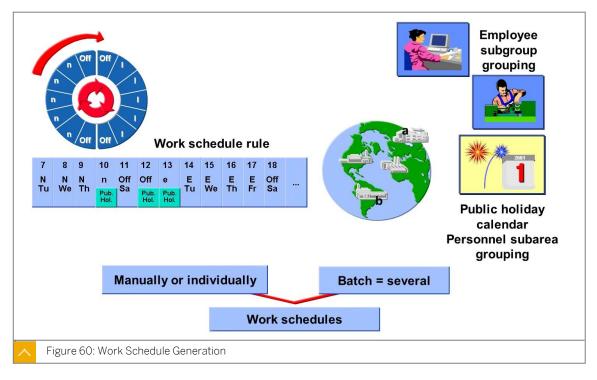
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Generate work schedules to set up work hours for employees

### Work Schedule Generation





The system generates a work schedule by applying the period work schedule to a horizontal axis and the public holiday calendar and by repeating it until the selected period is covered.

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Work schedules must be generated to define the planned working time for employees. Work schedules can be generated either manually or in batches. Before they can be generated, all the require groupings must be made and the work schedule rule must already be defined.

Automatic generation of work schedules enables multiple work schedules to be generated in a batch input session.

You can also generate all work schedules at one time by entering the time period to be generated. However, this method of generating work schedules does not apply to more than one client at one time.

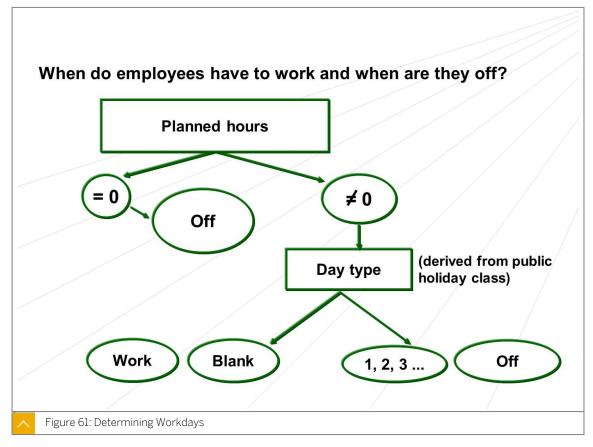


#### Note:

A previous and subsequent period of the work schedule must exist for each period to be calculated.

### **Determination of Workdays**





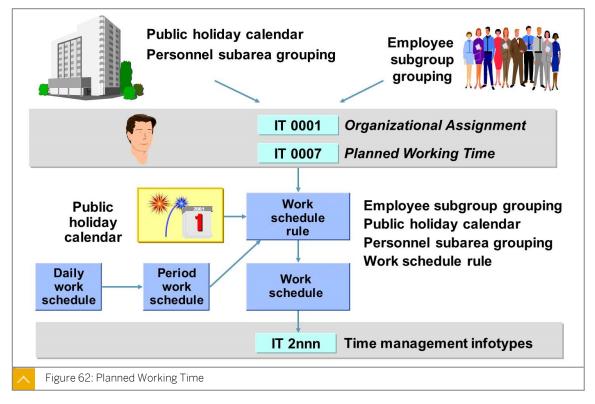
#### The following criteria determine whether a day is a day off in a work schedule:

- Planned hours
- Day type (derived from the public holiday class)

First, the planned hours are queried in the daily work schedule. If there are zero planned hours, the day is a day off; if not, the system checks the day type. The day type is always determined in accordance with the public holiday class. If the day type is not blank, the day is a day off.

## **Planned Working Time**





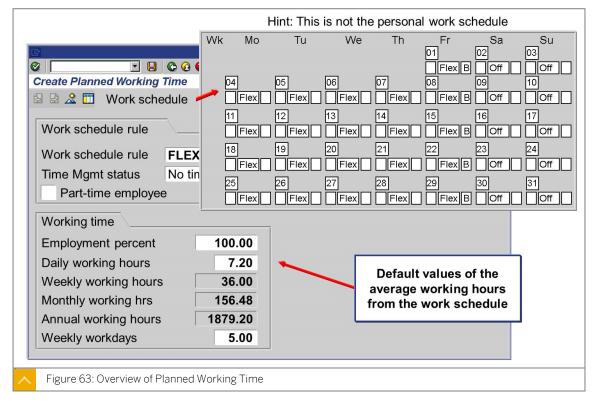
An employee's position in the enterprise structure is defined in the Organizational Assignment infotype (0001). The assignment in this infotype determines the work schedules that can be assigned to the employee.

Data stored in the Organizational Assignment infotype (0001) determines whether a work schedule is permitted for a certain employee. The system checks criteria such as employee subgroup and personnel area/subarea. It also checks if the work schedule was generated for the employee subgroup or personnel area/subarea in question.

A work schedule is assigned to an employee using the work schedule rule in the Planned Working Time infotype (0007).

### **Planned Working Time Infotype**





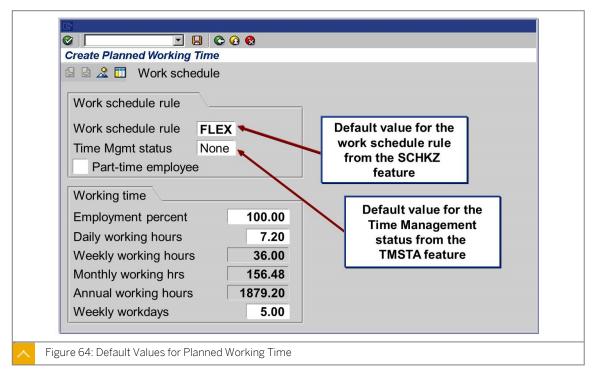
An employee's working time is stored as a work schedule rule in the Planned Working Time infotype (0007). This infotype also includes the average working hours valid for an employee, which are derived from the definition of a work schedule rule.

Planned working time is defined as the time between the start and end of work, excluding breaks. It specifies the time an employee has to work each day at the company.

Individualized information on employees' working time is represented in their personal work schedule. Personal work schedules contain any recorded changes and exceptions to employees' working time (such as substitutions), as well as any changes made at a higher level (employee subgroup groupings or personnel subarea groupings). An employee's actual working hours (including any modifications to working time) for each month are included in the personal work schedule.

### **Default Values for Planned Working Time**





You can use the SCHKZ feature to store default values for the work schedule rule. You can use the TMSTA feature to store default values for the time management status.

#### SCHKZ and TMSTA Features

When you assign an employee a planned working time for the first time, on hiring, for example, the SCHKZ feature can default a value for the work schedule based on the employee's organizational assignments. For example, if you want to assign the *FLEX* work schedule to all salaried employees in the *DT* employee subgroup, but want the *NORM* work schedule to be the default for all other employees, you use the SCHKZ feature to store default values for the Planned Working Time infotype (0007).

You access the SCHKZ feature in Customizing for Time Management under Work Schedules Planned Working Time Set Default Value for the Work Schedule.

Alternatively, call transaction PEO3 and enter the name of the feature.

The *Time Mgmt status* field specifies whether an employee is included in time evaluation and, if so, the type of time evaluation. You can use the TMSTA feature to default a value for the Time Management status in the Planned Working Time infotype when an infotype record is created. The value can be determined on the basis of an employee's organizational assignment. For example, you may want employees in personnel area 0001 to take part in time evaluation, but not employees in personnel area 0002.

### The possible values of the Time Management status are listed in the following table:

Value	Type of Time Evaluation
0	No time evaluation
1	Time evaluation of actual times
2	PDC time evaluation



Value	Type of Time Evaluation
7	Time evaluation without Payroll integration
8	External services
9	Time evaluation of planned times



## Note:

An employee with a Time Management status of Blank or 0 cannot be processed using time evaluation. This employee's time is processed in Payroll.



## **LESSON SUMMARY**

You should now be able to:

• Generate work schedules to set up work hours for employees

# Unit 3

# **Learning Assessment**

1.			nolidays and public holiday calendars can be modified to suit regional and ny-specific provisions.
	Dete	erm	ine whether this statement is true or false.
		Trı	ue
		Fal	lse
2.	The	pul	blic holiday calendar that is valid for an employee depends on the employee's
	Cho	ose	the correct answers.
		Α	personnel area
		В	personnel subarea
		С	public holiday class
		D	organizational unit
3.	Pub	lic ł	nolidays are grouped into public holiday classes in
	Cho	ose	the correct answer.
		Α	Administration
		В	Human Resources
		С	Accounts
		D	Cost Centers
4.	Spe	cifi	cations for work schedules are stored at which level?
	Cho	ose	the correct answers.
		Α	Daily
		В	Weekly
		С	Monthly
		D	Annual



5.	A work schedule can apply to only one personnel subarea at a time.
	Determine whether this statement is true or false.
	True False
6.	Variable breaks are breaks that employees can take after they have worked for a certain number of hours.  Determine whether this statement is true or false.
	True False
7.	The value O in the Type 1 column indicates that the break is of type.  Choose the correct answer.
	A fixed B variable C dynamic D overtime
8.	are the specific times when employees are required to be at work (in the flextime model).  Choose the correct answer.
	A Core times  B Actual times  C Flex times  D Planned times
9.	Daily work schedule classes are used for specifying the rules for generating time wage types and for absences counting.  Determine whether this statement is true or false.
	True False

10.	. A daily work schedule variant rule can contain a maximum of two subrules.  Determine whether this statement is true or false.
	True False
11.	A period work schedule can cover one week or more than one week.  Determine whether this statement is true or false.
	True False
12.	The personnel subarea grouping for daily work schedules is a group of personnel subareas that use the same daily work schedules, period work schedules, and break schedules.  Determine whether this statement is true or false.
	True False
13.	. Special days are days that are public holidays.  Determine whether this statement is true or false.
	True False
14.	. Several work schedule rules can be based on one period work schedule.  Determine whether this statement is true or false.
	True False
15.	To apply the period work schedule with a correct starting point from the period work schedule, you must enter which of the following information?  Choose the correct answers.
	A Reference date B Starting point
	C Employee subgroup grouping  D Work schedule rule

16.	The day type indicates whether a day is off and whether it is paid or unpaid in a work schedule.
	Determine whether this statement is true or false.
	True
	False
17.	The Time Management status field specifies whether the employee's times are processed using
	Choose the correct answer.
	A time evaluation
	B planned working time
	C personal work schedule
18.	Which elements does a work schedule in the SAP system contain?
	Choose the correct answers.
	A Weekly schedule
	<b>B</b> Break schedule
	C Daily work schedule
	D Night work schedule
	E Period work schedule

# Unit 3

# **Learning Assessment - Answers**

1.			nolidays and public holiday calendars can be modified to suit regional and ny-specific provisions.
	Dete	erm	ine whether this statement is true or false.
	X	Trı	ue
		Fa	lse
2.	The	pu	blic holiday calendar that is valid for an employee depends on the employee's
	Cho	ose	the correct answers.
	X	Α	personnel area
	X	В	personnel subarea
		С	public holiday class
		D	organizational unit
3.			nolidays are grouped into public holiday classes in  the correct answer.
			Administration
	X	В	Human Resources
		С	Accounts
		D	Cost Centers

4.	Specifications for work schedules are stored at which level?
	Choose the correct answers.
	X A Daily
	X B Weekly
	X C Monthly
	D Annual
5.	A work schedule can apply to only one personnel subarea at a time.  Determine whether this statement is true or false.
	True
	X False
6.	Variable breaks are breaks that employees can take after they have worked for a certain number of hours.
	Determine whether this statement is true or false.
	True
	X False
7.	The value O in the Type 1 column indicates that the break is of type.  Choose the correct answer.
	A fixed
	B variable
	C dynamic
	X D overtime

8.	£1 =	are the specific times when employees are required to be at work (in the
		ne model). e the correct answer.
	CHOOS	e the correct answer.
	X A	Core times
	В	Actual times
	С	Flex times
	D	Planned times
9.	_	vork schedule classes are used for specifying the rules for generating time wage and for absences counting.
	Deterr	nine whether this statement is true or false.
	X Tr	rue
	☐ Fá	alse
10.	. A daily	work schedule variant rule can contain a maximum of two subrules.
	Deterr	nine whether this statement is true or false.
	Tı	rue
	X Fa	alse
11.		od work schedule can cover one week or more than one week.  mine whether this statement is true or false.
	Deterr	mile whether this statement is true or raise.
	X Tı	rue
	Fa	alse
12.		ersonnel subarea grouping for daily work schedules is a group of personnel subareas se the same daily work schedules, period work schedules, and break schedules.
	Deterr	nine whether this statement is true or false.
	X Tr	rue
	Fa	alse

13. Special days are days that are public holidays.
Determine whether this statement is true or false.
True  X False
14. Several work schedule rules can be based on one period work schedule.  Determine whether this statement is true or false.  X True
False
15. To apply the period work schedule with a correct starting point from the period work schedule, you must enter which of the following information? Choose the correct answers.
<ul> <li>X A Reference date</li> <li>X B Starting point</li> <li>C Employee subgroup grouping</li> <li>D Work schedule rule</li> </ul>
<ul> <li>16. The day type indicates whether a day is off and whether it is paid or unpaid in a work schedule.</li> <li>Determine whether this statement is true or false.</li> <li>X True</li> <li>False</li> </ul>
<ul> <li>17. The Time Management status field specifies whether the employee's times are processed using</li> <li>Choose the correct answer.</li> <li>X A time evaluation</li> <li>B planned working time</li> </ul>
C personal work schedule

18. Which elements does a work schedule in the SAP system contain?		
Choose the correct answers.		
A Weekly schedule		
X B Break schedule		
X C Daily work schedule		
D Night work schedule		
X E Period work schedule		

# **UNIT 4** Part-Time Workforce

#### Lesson 1

Setting Up Part-Time Work Schedules

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#### **UNIT OBJECTIVES**

• Set up a part-time work schedule

### **Setting Up Part-Time Work Schedules**

#### **LESSON OVERVIEW**

This lesson shows you how to create and assign part-time work schedules.

#### **Business Example**

You need to create work schedules for the part-time workers in your company. For this reason, you require the following knowledge:

- An understanding of work schedule rules
- An understanding of the Planned Working Time infotype (ITO007)



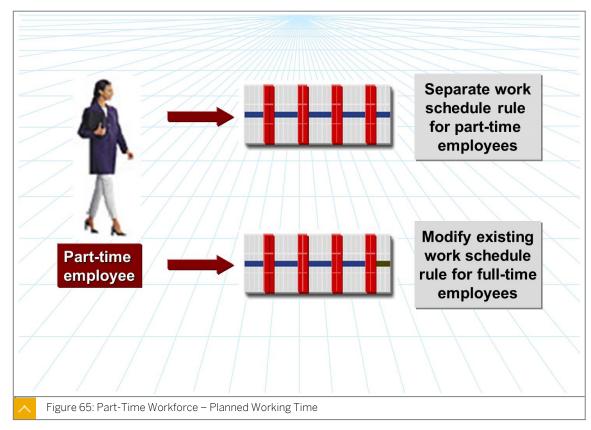
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Set up a part-time work schedule

#### **Part-Time Working Provisions**



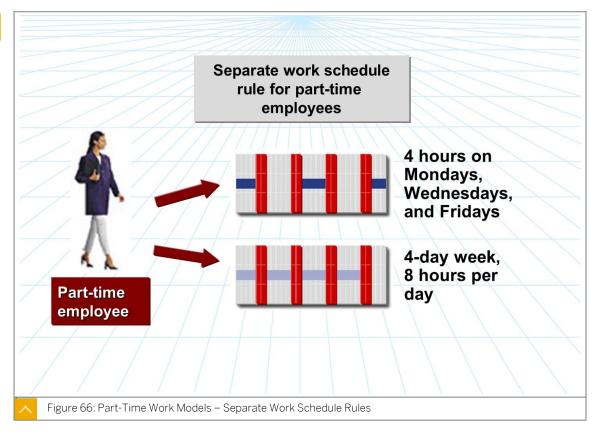




You can set up part-time working provisions in two different ways. You can either create your own work schedule rules for your part-time employees or modify the work schedule rules that exist for your full-time employees.

#### Separate Work Schedule Rules





To create a separate work schedule rule for part-time employees, follow the same procedure as you did for creating work schedule rules for your full-time employees. A work schedule rule for your part-time staff can be used for all employees who are to work according to this rule.

#### To create separate work schedules, you perform the following steps:

- 1. Set up elements, such as daily work schedules, period work schedules, and work schedule rules, and so on, in Customizing
- 2. Generate a work schedule from the elements
- **3.** Assign the work schedules to part-time employees in the Planned Working Time infotype (0007)

#### Part-Time Work Schedules

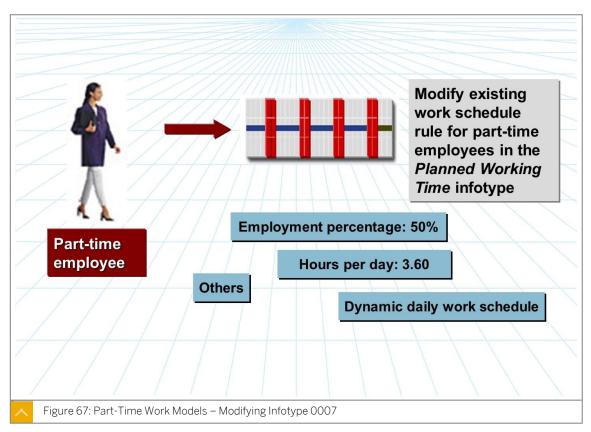
If your company employs part-time employees in addition to full-time employees, you can create separate work schedule rules for your part-time employees.

### The following table lists the work schedule rule that needs to be created for each type of working option:

Part-Time Working Option	Work Schedule Rule
Fewer working hours every day	You need to define the shortened working time in the daily work schedule by specifying fewer planned working hours, for example 4 instead of 8.
Fewer days in a week, but the same daily work schedules as full-time employees	You can group the daily work schedules into an applicable period work schedule. For example, you can make it a 3-day working week instead of 5.
Fewer working hours each day and fewer days each week	You need to define the shortened working time in the daily work schedule and group the daily work schedules into an applicable period work schedule.

#### Modification of an Existing Work Schedule





To specify a part-time rule based on a full-time work schedule rule, you need to modify the average working hours in the existing daily work schedule in the Planned Working Time infotype (0007). This has to be done for each applicable employee.

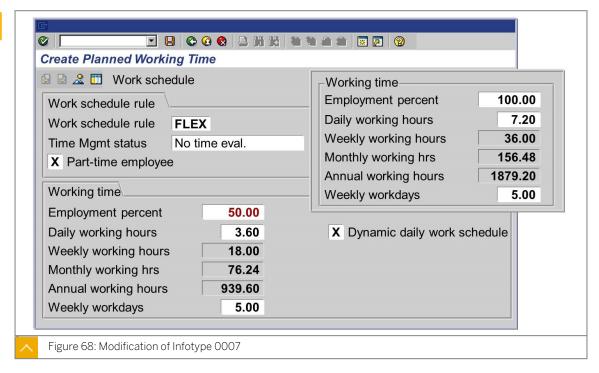
Modifying the existing work schedule involves setting the employment percentage, the working hours per day, week, month, or year, to a lower value. You can use the function for creating daily work schedules dynamically to specify variable working times for part-time employees in your enterprise.

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#### Modification of Infotype 0007





To specify a part-time rule based on a full-time work schedule rule, you must change the average working hours of the full-time work schedule rule in the Planned Working Time infotype (0007) for each employee individually. This can be done in one of the fields in the Working time section of the Planned Working Time infotype.

The fields that you can overwrite are *Employment percent*, *Daily working hours*, *Weekly working hours*, *Monthly working hours*, and *Annual working hours*. If you overwrite one field, the other fields are automatically adjusted. As soon as the employment percentage is less than 100%, the *Part-time employee* field is activated. In addition, the personal work schedule for the employee is modified accordingly to reflect the part-time working hours.



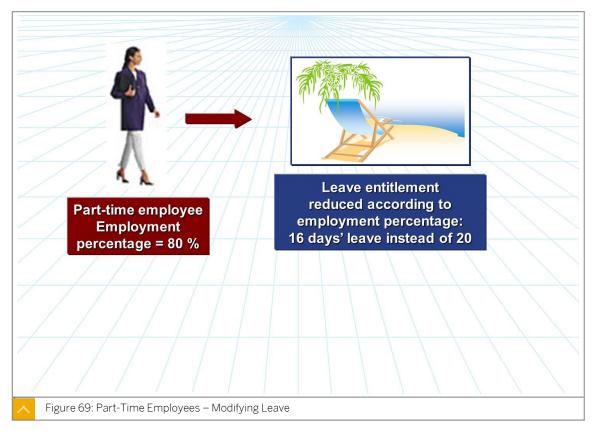
#### Note:

You can customize which of the *hours* fields are ready for input. In the standard system, only the *Daily working hours* field is active.

Part-time work can also be specified in the Planned Working Time infotype (0007) using the *Dynamic daily work schedule* function. In this way, you can overwrite specific fields of the daily work schedule for part-time employees according to the specifications in the Planned Working Time infotype (0007).

#### **Leave Modification**





If quota entitlements, such as leave, need to be reduced for part-time employees, you need to create the required reduction rules with the necessary conditions in Customizing.

You can modify the leave entitlement according to the employment percentage for your part-time employees in the Planned Working Time infotype (0007). Alternatively, you can modify the capacity utilization level in the Basic Pay infotype (0008) or the *Weekly workdays* field in the Planned Working Time infotype 0007.



#### **LESSON SUMMARY**

You should now be able to:

• Set up a part-time work schedule

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# Unit 4

# **Learning Assessment**

1.	To specify a part-time rule based on a full-time work schedule rule, you need to modify the average working hours in the existing daily work schedule. This has to be done		
	Choose the correct answer.		
	A for each applicable employee		
	B for the group using the same rule		
2.	You can create a separate work schedule rule for a part-time employee by following the procedure used for creating work schedule rules for full-time employees.		
	Determine whether this statement is true or false.		
	True		
	False		
3.	To specify a part-time rule based on a full-time work schedule rule for each employee individually, you change the average working hours of the full-time work schedule rule in the		
	Choose the correct answer.		
	A Basic Pay infotype (0008)		
	B Planned Working Time infotype (0007)		
	C Organizational Assignment infotype (0001)		
	D Personal Data infotype (0002)		
4.	You must always enter a separate work schedule rule for each part-time model.		
	Determine whether this statement is true or false.		
	True		
	False		



# **Learning Assessment - Answers**

1.	To specify a part-time rule based on a full-time work schedule rule, you need to modify the average working hours in the existing daily work schedule. This has to be done		
	Choose the correct answer.		
	X A for each applicable employee		
	B for the group using the same rule		
2.	You can create a separate work schedule rule for a part-time employee by following the procedure used for creating work schedule rules for full-time employees.		
	Determine whether this statement is true or false.		
	X True		
	False		
3.	To specify a part-time rule based on a full-time work schedule rule for each employee individually, you change the average working hours of the full-time work schedule rule in the		
	Choose the correct answer.		
	A Basic Pay infotype (0008)		
	X B Planned Working Time infotype (0007)		
	C Organizational Assignment infotype (0001)		
	D Personal Data infotype (0002)		
4.	You must always enter a separate work schedule rule for each part-time model.		
	Determine whether this statement is true or false.		
	True		
	X False		

# **UNIT 5** Time Data Recording and **Administration**

#### Lesson 1

Setting Up Attendance and Absence Types	115
Lesson 2	
Outlining the Set Up of Additional Time Infotypes	125
Lesson 3	
Determining System Reactions to Colliding Time Infotypes	133

#### **UNIT OBJECTIVES**

- Set up attendance and absence types
- Outline the set up of additional time infotypes
- Determine how the system reacts when time infotypes collide



### **Setting Up Attendance and Absence Types**

#### **LESSON OVERVIEW**

This lesson shows you how to set up attendance and absence types and track employee time.

#### **Business Example**

As a time administrator, you are responsible for recording employee time data on various infotypes. The time entries you need to make are related to absences and attendances. For this reason, you require the following knowledge:

- An understanding of time infotypes
- An understanding of attendance and absence types
- An understanding of quotas



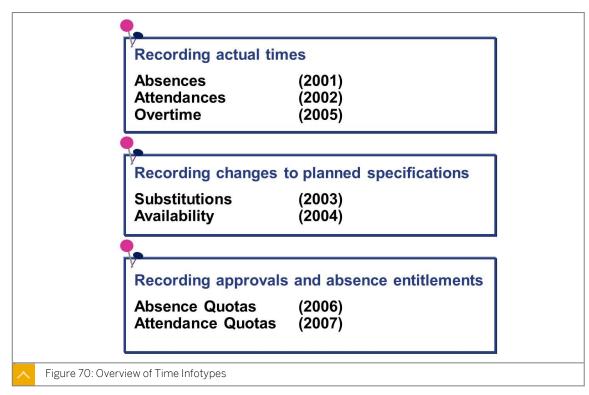
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Set up attendance and absence types

#### Time Infotypes





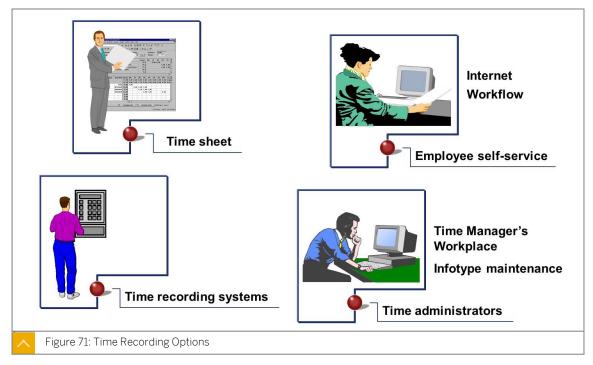
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Planned specifications for an employee's working time are stored in the Planned Working Time infotype (0007). The specified working times change if, for example, the employee works overtime, takes leave, attends a seminar, or works different times.

This time data is stored in infotypes in Time Management, and can be transferred and processed in Time Evaluation and Payroll, when required.

#### **Time Recording Options**





### In Time Management, you can use the following systems and methods to record time and labor data:

- Online entry by time administrators
- Front-end time recording systems
- SAP Cross-Application Time Sheet (CATS)
- Self-service applications, such as Internet applications, workflow forms, or touch-screen systems
- · Customer-specific systems with an interface to SAP

The Time Manager's Workplace (TMW) was developed specifically for decentralized time administrators. TMW provides a user interface to optimize the recording and maintaining of time data for these administrators. Time data is entered using intuitive time data IDs, and is stored in the applicable time infotypes.

# The following options are available if you maintain time data directly in the infotypes: Single screen:

Single screen time entry allows you to enter one infotype record for an employee.

#### Fast entry:

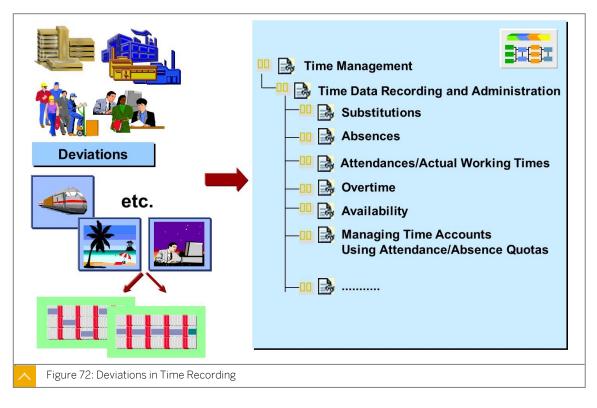
Fast entry allows you to enter one infotype record for several employees at the same time.

#### List entry:

List entry enables you to enter several infotype records for an employee.

#### **Deviations in Time Recording**



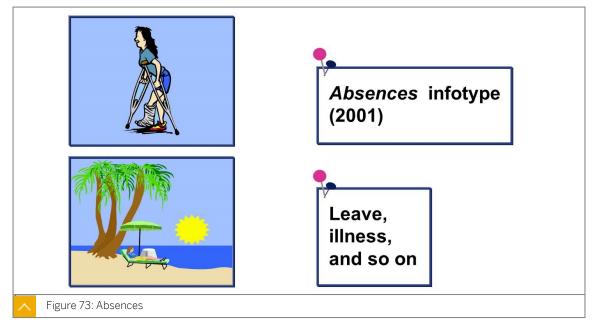


To ensure efficient recording of various working time deviations, you must check the corresponding settings in Customizing and modify them, if necessary. You can set up deviations in time recording by completing the Customizing steps under *Time Data Recording and Administration*. In Customizing choose *Time Management*  $\rightarrow$  *Time Data Recording and Administration*.

#### **Attendance and Absence Types**

#### **Absences**



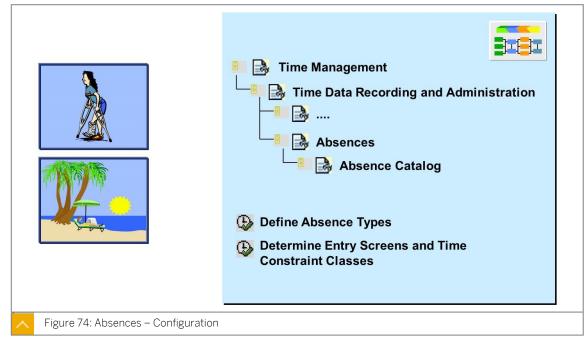


An employee is considered absent if the employee does not work the scheduled working hours stipulated in their personal work schedule. Absences include, for example, leave or illness, and can be classified as paid or unpaid. The *Absences* infotype (2001) is used to enter the times during which an employee is absent from work. Absences are further defined by an absence type, which is a subtype of the *Absences* infotype (2001).

The absence types depend on the personnel subarea grouping for attendances and absences. If you want to assign the same attendance and absence types to two or more personnel subareas, assign the same grouping to those personnel subareas. Multiple groupings are required if you use different attendance and absence types for each personnel subarea.

#### **Absences - Configuration**





An absence catalog, with samples of absence types that you can copy and modify, is included in Customizing. To set up absence types, you need to complete the Customizing steps under Time Management  $\rightarrow$  Time Data Recording and Administration  $\rightarrow$  Absences.

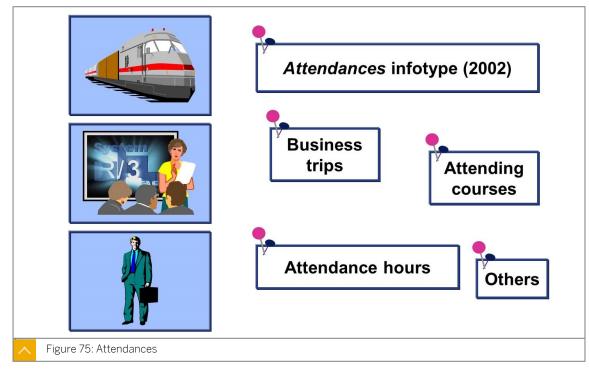
Because the individual absence types contain different types of information, the SAP system uses a separate entry screen to record each absence in the *Absences* infotype (2001).

You can determine which input checks the system performs when an absence is recorded. For example, you can set up the system to warn the user if an absence entry is recorded for a scheduled day off. You can limit the absence to a specific number of days or only part of a day Each absence is assigned a time constraint class, which is referenced during the collision check for existing time types. The absences are counted using counting rules and are valuated in Payroll or Time Evaluation.

Because the individual absence types contain different types of information, the system uses a separate entry screen to record each absence in the *Absences* infotype (2001).

#### **Attendances**



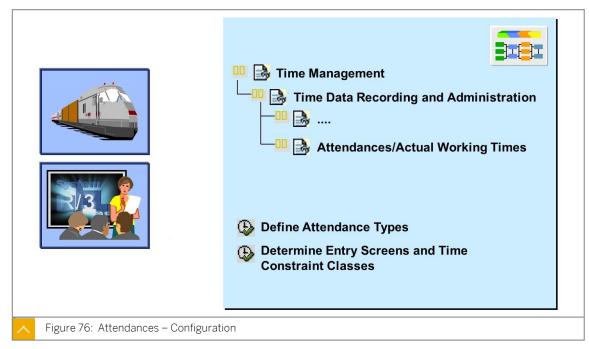


Attendances describe the employee's work schedule or provide additional information on the employee's time. Attendances are recorded in the *Attendances* infotype (2002) and are defined further by an *attendance type* (subtype). Using this infotype, you can store, for example, an employee's working hours, attendance at training courses, overtime, and business trips. If you record attendances in detail, you can assign the hours worked by a particular employee to specific orders or to a cost center, including one that differs from the master cost center assigned to the employee.

If you do not use time-recording systems, you can use the *Attendances* infotype (2002) to record actual hours worked by an employee.

#### Attendances - Configuration



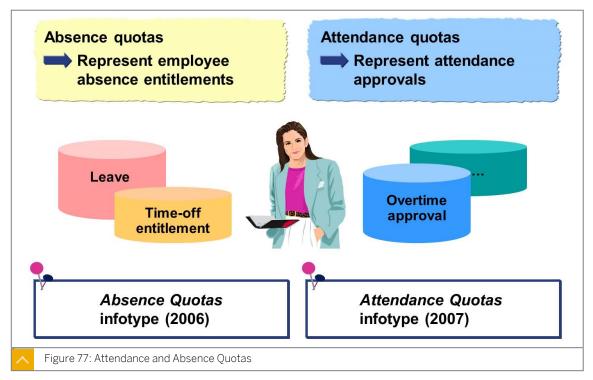


Attendances are set up in Customizing in the same way as absences. SAP delivers samples of attendance types that you can use as delivered, or copy and modify to meet your business requirements.

You set up attendance types in Customizing for *Time Management* under *Time Data Recording and Administration*  $\rightarrow$  *Attendances* .

#### Quotas





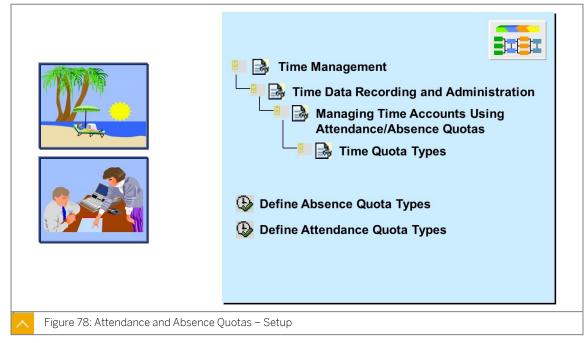
Employees could be entitled to privileges such as leave, overtime, and training. These types of entitlements can be stored in quotas from which attendances and absences are deducted.

Employees' absence entitlements, such as standard annual leave, educational leave, and non-working shift entitlement, are an employee's time-limited entitlements to an absence. These entitlements are set up in the *Absence Quotas* infotype (2006) and can be reduced by each recorded absence.

An attendance quota is an employee's time-limited entitlement to certain attendances such as overtime. Recording an attendance of this type reduces an employee's entitlement. These attendances are set up in the *Attendance Quotas* infotype (2007) and their approvals can be queried in Time Evaluation.

#### Attendance and Absence Quotas - Setup



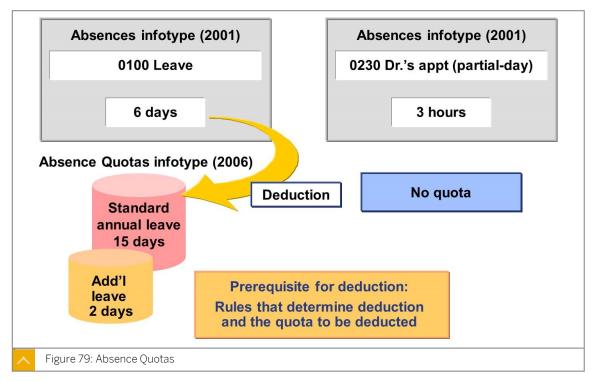


To set up absence quotas in Customizing, choose  $Time\ Management o Time\ Data\ Recording$  and  $Administration o Managing\ Time\ Accounts\ Using\ Attendance/Absence\ Quotas\ o\ Time\ Quota\ Types\ o\ Define\ Absence\ Quota\ Types\ .$ 

To set up attendance quotas in Customizing, choose  $Time\ Management o Time\ Data$   $Recording\ and\ Administration o Managing\ Time\ Accounts\ Using\ Attendance/Absence$   $Quotas o Time\ Quota\ Types o Define\ Attendance\ Quota\ Types\ .$ 

#### **Quota Deductions**

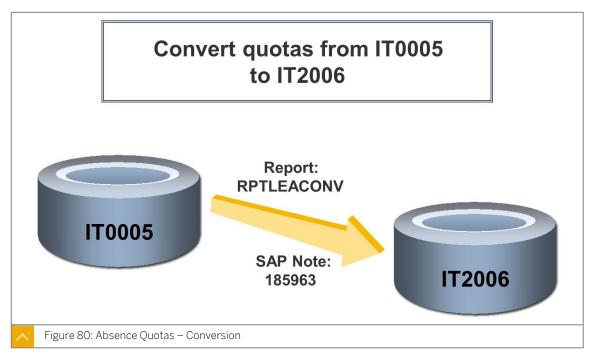




Attendances and absences can be deducted from quotas, but do not have to be. If attendances and absences are deducted from quotas, you must specify from which quotas the deductions must be made. If there are multiple quotas available, you must specify the order in which the quotas should be reduced.

#### Absence Quotas - Conversion





You can manage your employee's leave entitlements using the *Leave Entitlement* infotype (0005) or the *Absence Quotas* infotype (2006).

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The Absence Quotas infotype (2006) offers more functions and flexibility for accruing, managing, and deducting from leave entitlements compared to the Leave Entitlement infotype (0005).

If you are using the *Leave Entitlement* infotype (0005) and would like to start using the *Absence Quotas* infotype (2006), you can convert existing entitlements. To simplify the conversion to quotas, you can use the RPTLEACONV report, which enables you to transfer your employees' remaining leave from the *Leave Entitlement* infotype (0005) to the *Absence Quotas* infotype (2006).

To do so, in table T559J (Convert Leave Types to Quota Types), enter the leave types you want to transfer and the absence quota types they are to be transferred to. When setting up this transfer, consider the applicable employee subgroup groupings and personnel subarea groupings.

You maintain table T559J through the V\_T559J view.

We recommend the use of absence quotas to manage employees' leave entitlements. The Leave Entitlement infotype (0005) is available, but will not be developed further. For more information, refer to SAP Notes 366686, 312911, and 381856.



#### **LESSON SUMMARY**

You should now be able to:

• Set up attendance and absence types

### Unit 5 Lesson 2

# Outlining the Set Up of Additional Time Infotypes

#### **LESSON OVERVIEW**

This lesson shows you how to customize existing time infotypes.

#### **Business Example**

As a time administrator, you need to record deviations from regular working time. For this reason, you require the following knowledge:

- An understanding of additional time infotypes
- An understanding of how infotypes are customized



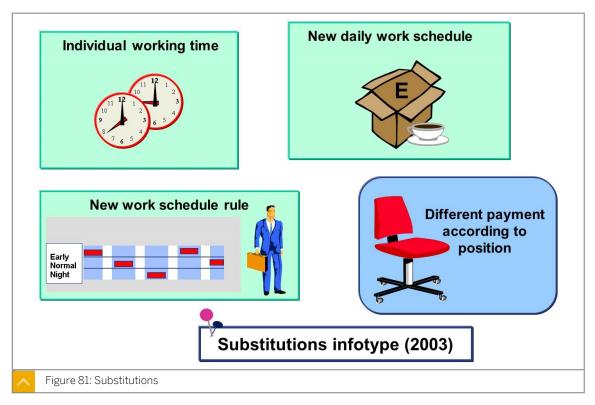
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Outline the set up of additional time infotypes

#### Additional Time Infotypes





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A substitution occurs when an employee has to carry out activities that require a different working time or payment from that stipulated in the employee's work schedule.

Substitutions are recorded in the Substitutions infotype (2003).

### The following list shows examples of substitution types available in the Substitutions infotype:

#### Individual working time:

This substitution is recommended for changes to planned working time that cannot be represented in daily work schedules or work schedules. You enter clock times to indicate the start and end of working time. The original planned working time is overwritten.

#### New daily work schedule:

This substitution is recommended for daily changes to planned working time. It replaces the employee's original planned working time.

#### New work schedule rule:

This substitution is recommended for long-term changes to planned working time. You enter the personnel number of the employee that the individual is substituting for. The system then applies the work schedule of the other employee. The original planned working time for the employee performing the substitution is overwritten.

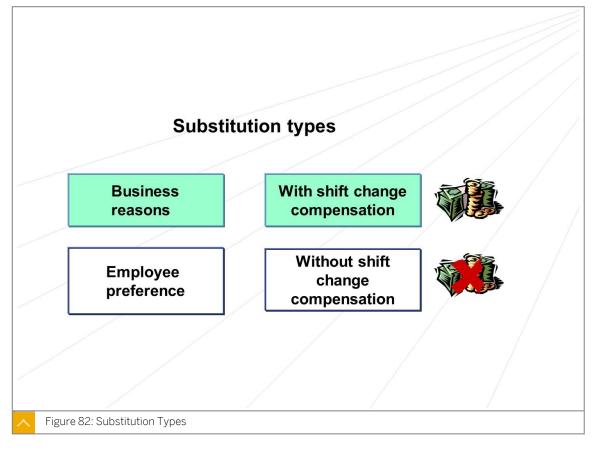
#### Different payment according to another position:

This substitution permits a different payment according to a position that specifies the intended payment. The planned working time is not overwritten unless you combine this substitution with one of the other substitutions.

You can record a different payment (premium, different pay scale group, and so on) for a substitution. You can also assign the substitution either to a cost center that deviates from the master cost center or an order.

#### **Substitution Types**





You can set up various types of substitutions, such as foreman substitutions and shift substitutions. Depending on the substitution type, you can determine if a bonus or other type of compensation applies.

#### Some examples of different uses for various substitution types are as follows:

#### Substitution type 01 = Employee preference:

An employee voluntarily substitutes for a night shift.

#### Substitution type 02 = Business reason:

An employee is assigned this substitution.

Shift change compensation can be set up to be paid only for business reasons as in substitution type 02. When setting up the substitution type, you can specify if compensation for a shift change is to be paid. This can also be queried in schema XT00 in Payroll.



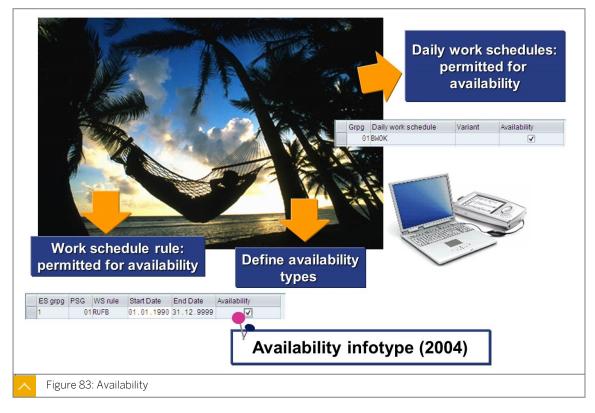
#### Note:

You can use the VTART feature to define a default substitution type.

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#### Availability Infotype





The Availability infotype (2004) stores the availability of an employee. You can maintain various types of availabilities that are defined for fixed periods. Availability can be specified by clock times, a daily work schedule, or a work schedule rule. The daily work schedule and work schedule rules must be permitted for use in availabilities.

Before setting up availabilities, you must first set up the assignment of groupings for availability and substitution types for the personnel areas and subareas. The standard system uses grouping *01*. Additional groupings are required only if different availability and substitution types are used in different personnel areas and subareas.

Example: Personnel subareas 0001 and 0002 use the same availability types and personnel subarea 0003 uses a different availability type.

#### In this example, you must perform the following steps to set up the availability types:

- Define the availability types required for the personnel subarea groupings.
- Check the time constraint class for collisions with other time infotypes.
- Indicate the daily work schedules and work schedule rules permitted for availabilities.

#### Overtime Infotype



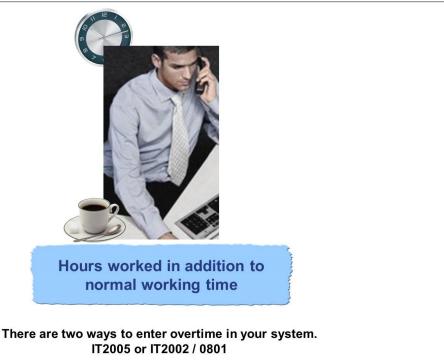


Figure 84: Overtime

Overtime is the hours that employees work in addition to the planned working time defined in their daily work schedule. Overtime can be recorded using the Attendances infotype (2002) or the Overtime infotype (2005) if you only want to record deviations to the work schedule. The overtime compensation type field in these infotypes is used to determine whether the overtime is paid or compensated by time off.

You can also record a different payment, such as a premium or different pay scale group, for the overtime entered. In addition, you can assign the overtime to a cost center that deviates from the master cost center of the employee, or to an order. You can only enter activity allocation data in the Attendances infotype (2002). Activity allocation is a secondary cost allocation and can include allocating time internally, for example when an employee works for another department. This activity can be allocated between cost centers.

If you use the Attendances infotype (2002) to record overtime, you can enter an overtime compensation type in the single screen, list entry, and weekly entry screens. With this, you can determine at the time of recording attendance that any resulting overtime is compensated either with a payment or by time off. In addition, you can avoid using the functions in the Overtime infotype (2005). Overtime can then be recorded in combination with other working times using the usual units for attendance with corresponding attendance types. In Time Evaluation, the overtime compensation type is processed in the same way as it is processed when using the Overtime infotype (2005).



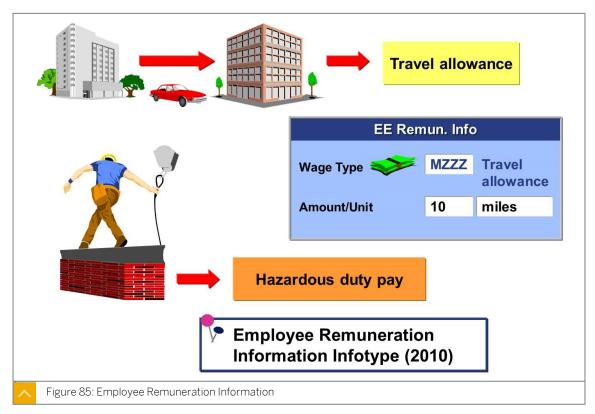
The Overtime infotype is not available in the Time Manager's Workplace.

If you use Time Evaluation, overtime is automatically calculated from the complete actual times worked by employees. In Time Evaluation, you can process overtime that has been

determined in various ways (for example, based on a daily or weekly total), and approval (for specific employees according to work schedules).

#### **Employee Remuneration Information Infotype**





You use the *Employee Remuneration Information* infotype (2010) to store wage amounts that have been calculated manually, such as hazardous duty payments, and other wage types that cannot be planned. These wage types cannot be automatically generated in Payroll and must, therefore, be recorded manually. Values determined in the *Employee Remuneration Information* infotype (2010) are transferred directly to Payroll.

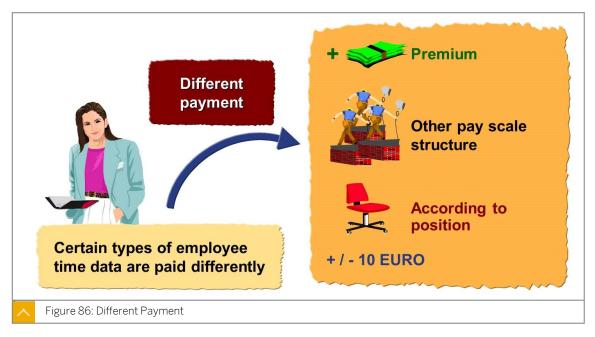
The Employee Remuneration Information infotype (2010) relates to a key date, which is a validity date and not a validity interval. If the key date is within a certain payroll period, remuneration takes place in the same period.

For example, employees using their own car to drive from one plant location to another are entitled to a travel allowance. You can enter the allowance in the *Employee Remuneration Information* infotype (2010) and assign an appropriate wage type to it.

The wage types used for this infotype can be customized to suit your requirements.

#### **Different Payment**





You can record different compensation for certain types of employee time data.

When you record time data, such as attendances, overtime, absences, and availability, you can enter the following specifications for a different payment:

- Use a bonus or premium as supplemental remuneration
- Use a pay-scale assignment that deviates from the employee's regular pay scale
- Use position-based payment
- Use the extra pay indicator and the valuation basis for a bonus or the deduction of concrete amounts
- Use a cost center other than the master cost center



#### Note:

You can assign employee time data to a cost center other than the master cost center.



#### **LESSON SUMMARY**

You should now be able to:

• Outline the set up of additional time infotypes

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### Unit 5 Lesson 3

# Determining System Reactions to Colliding Time Infotypes

#### **LESSON OVERVIEW**

This lesson shows you how to determine the system reaction to the collision of time infotypes and the impact on employee time records.

#### **Business Example**

You need to configure time data recording and specify how you want the system to react when time infotypes collide. For this reason, you require the following knowledge:

- An understanding of time infotype collisions
- An understanding of how the system reacts to time infotype collisions



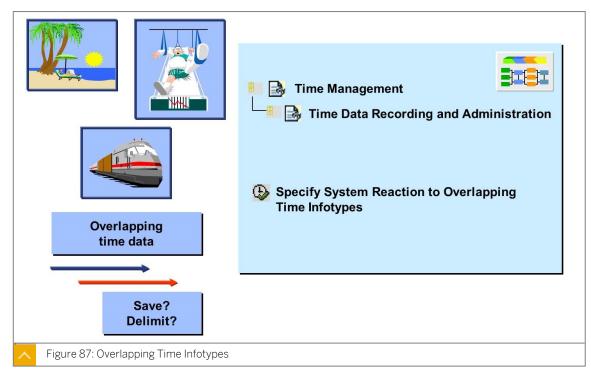
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

· Determine how the system reacts when time infotypes collide

#### **Time Infotype Collisions**



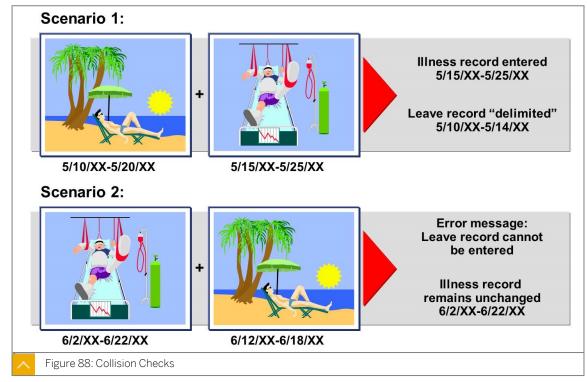




When time data is recorded, infotype data records frequently overlap. These overlapping infotype records are called collisions. The system reacts in various ways when time infotypes collide. These system reactions are controlled by the time constraint class.

#### **Collision Checks**

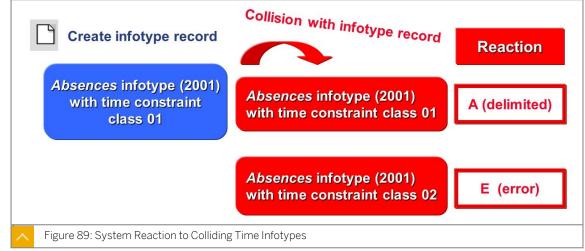




To prevent conflicting data records from coexisting in the system, the system checks whether other records for the employee have been recorded for the same time period. This check is performed when new time data is entered. If a collision occurs, the system reacts by issuing an error message, a warning, or by delimiting the old record.

#### **System Reactions to Collisions**





Collision checks reference the time constraint classes of time recording data.

### The following table lists the possible time constraint reactions to collisions when recording an infotype:

Reaction Indicator	Description
A	The existing record is delimited and the new record is created. The system issues a message.
E	The new record cannot be added. The system issues an error message.
W	A new record is created; the existing record is not changed. The system issues a warning message.
N	A new record is created; the existing record is not changed. The system does not issue a warning message.

For example: *Absences* infotype (2001) with subtype Partial-day leave (time constraint class 01) exists in the system. Another *Absences* infotype (2001) with subtype Leave (time constraint class 01) is entered in the system with dates that overlap with the existing infotype. Based on the configuration of the time constraint classes associated with the absence, the system reacts by delimiting the existing partial-day leave record.

Another example: *Absences* infotype (2001) with subtype Illness (time constraint class 02) exists in the system. Another *Absences* infotype (2001) with subtype Leave (time constraint class 01) is entered in the system with dates that overlap with the existing infotype. Based on the configuration of the time constraint classes, the system reacts by generating an error message indicating that the new Leave record cannot be saved.



#### **LESSON SUMMARY**

You should now be able to:

Determine how the system reacts when time infotypes collide



# Unit 5

# **Learning Assessment**

1.	To assign the same attendance and absence types to two or more personnel subareas, you need to define
	Choose the correct answer.
	A the same grouping for these personnel subareas
	B as many groupings as the personnel subareas
2.	Absences are counted using sequence rules.
	Determine whether this statement is true or false.
	True
	False
3.	Employee entitlements, such as leave and overtime, are stored in
	Choose the correct answer.
	A quotas
	B entitlements
	C attendances
	D absences
4.	Attendances are entered in infotype 2002.
	Determine whether this statement is true or false.
	True
	False

5.	Short-term deviations from personal work schedules and payment for an employee are recorded in the system using the infotype.
	Choose the correct answer.
	A Availability
	B Overtime
	C Substitutions
	D Employee Remuneration
6.	Which infotype do you use if you want to record only the deviations from the work schedule?
	Choose the correct answer.
	A Attendances infotype (2002)
	B Overtime infotype (2005)
	C Availability infotype (2004)
	D Absences infotype (2001)
7.	If you record the date in the Employee Remuneration Information infotype (2010) and the key date is within a certain payroll period, remuneration takes place in the same period. Determine whether this statement is true or false.
	True
	False
0	
8.	A leave record is created in infotype (2001) with time constraint class 01. It collides with an existing partial-day leave record in infotype (2001) with the time constraint class 01. How will the system react to this collision if the indicator A is configured for this collision?
	Choose the correct answer.
	A By delimiting the existing partial-day leave record
	<b>B</b> By displaying an error message and not saving the record

# Unit 5

### **Learning Assessment - Answers**

1.	To assign the same attendance and absence types to two or more personnel subareas, you need to define  Choose the correct answer.
	<ul><li>X A the same grouping for these personnel subareas</li><li>B as many groupings as the personnel subareas</li></ul>
2.	Absences are counted using sequence rules.  Determine whether this statement is true or false.
	True  X False
3.	Employee entitlements, such as leave and overtime, are stored in  Choose the correct answer.
	X A quotas  B entitlements
	C attendances  D absences
4.	Attendances are entered in infotype 2002.
	Determine whether this statement is true or false.  X True
	False

5.		term deviations from personal work schedules and payment for an employee are led in the system using the infotype.
	Choos	e the correct answer.
	A	Availability
	В	Overtime
	x c	Substitutions
	D	Employee Remuneration
6.	sched	
	Choos	e the correct answer.
	A	Attendances infotype (2002)
	ХВ	Overtime infotype (2005)
	c	Availability infotype (2004)
	D	Absences infotype (2001)
7.	-	record the date in the Employee Remuneration Information infotype (2010) and the ite is within a certain payroll period, remuneration takes place in the same period.
	Detern	nine whether this statement is true or false.
	T X	rue
	Fa	alse
8.	an exis	e record is created in infotype (2001) with time constraint class 01. It collides with sting partial-day leave record in infotype (2001) with the time constraint class 01. Will the system react to this collision if the indicator A is configured for this collision? We the correct answer.
	X A	By delimiting the existing partial-day leave record
	В	By displaying an error message and not saving the record

# UNIT 6

# **Attendance and Absence Counting**

#### Lesson 1

Defining Counting Rules for Attendances and Absences	143
Lesson 2	
Assigning Counting Rules to Absence Types	153
Lesson 3	
Utilizing Daily Work Schedule Variants to Count Absences	155

#### **UNIT OBJECTIVES**

- Define counting rules to ensure employee attendances and absences are recorded correctly
- Assign a counting rule to an absence type
- Utilize daily work schedule variants to count absences



### Unit 6 Lesson 1

# **Defining Counting Rules for Attendances and Absences**

#### **LESSON OVERVIEW**

This lesson shows you how to define counting rules for attendances and absences.

#### **Business Example**

To ensure that the attendances and absences of employees are correctly recorded, you need to define counting rules. For this reason, you require the following knowledge:

- An understanding of counting and quota deduction rules
- An understanding of counting rules for attendances and absences
- An understanding of how to define counting rules



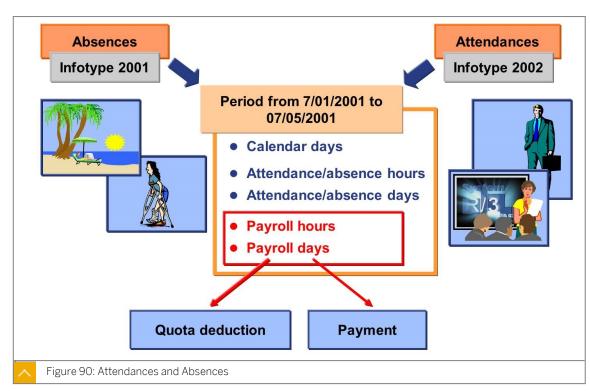
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

 Define counting rules to ensure employee attendances and absences are recorded correctly

#### **Attendance and Absence Counting Rules**



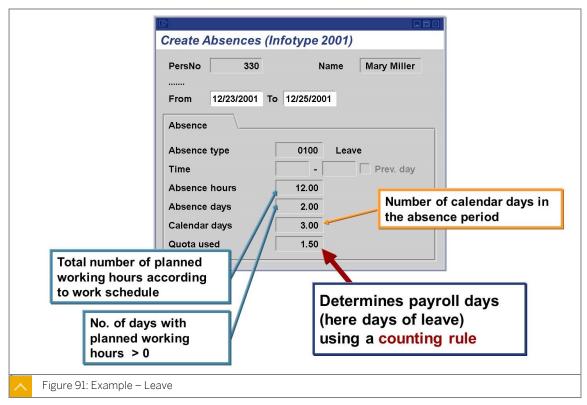




To calculate the duration of an attendance or absence, the system first references the number of planned hours from the daily work schedule valid for the specific day. However, this method may not work for counting the duration of an attendance or absence on certain days, such as public holidays. For such situations, you use rules to control how the daily duration of an attendance or absence is counted.

#### Units for Calculating Duration of Attendances and Absences





The duration of an attendance or an absence is calculated using the following types of units in the SAP system:

#### Calendar days:

The system calculates calendar days using actual calendar days for the attendance or absence. Partial days are calculated as 0 calendar days.

#### Attendance/absence hours, attendance/absence days:

The system calculates the attendance or absence hours by using the planned hours specified in the work schedule. Only the days on which the employee had planned hours are included in the calculation.

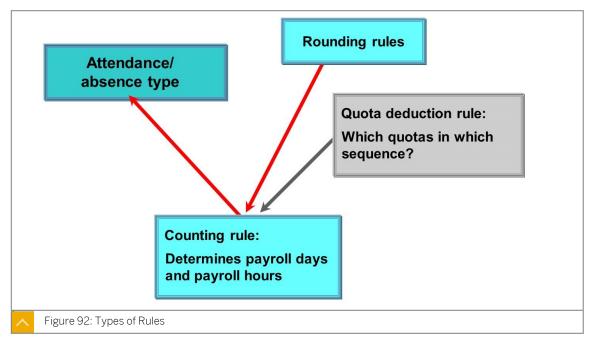
#### Payroll hours:

The system uses payroll days and hours to deduct quotas. Payroll days, found in the number field of a wage type, are also used by the system during the processing of payroll. The calculation of payroll days and hours is controlled by the settings made for attendance or absence counting. In this way, you can also include attendance and absence days in the calculation for days on which the employee did not have any planned hours.

These units are included in the Attendances and Absences infotypes.

#### **Rules**





#### Some of the rules that apply to counting attendances and absences are as follows:

#### Counting rule:

The rules for counting attendances and absences are used to determine the payroll days and hours of an attendance or absence.

#### Rounding rule:

When attendances and absences are counted, the system may determine values to several decimal places. These decimal places are not normally used in quota deduction or in payroll. You assign a rounding rule to the counting rule to determine how the values are to be rounded.

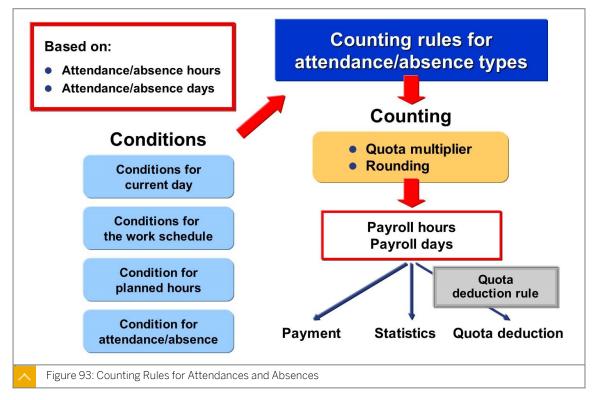
#### Deduction rule for quotas:

The counting rule can also be assigned a deduction rule for quotas, which, in the case of quota deduction, determines which quotas are deducted in which sequence.

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#### **Conditions for Counting Rules**





A counting rule must be assigned to each attendance or absence type to ensure that the payroll days and hours are determined for the special attendance or absence. In addition, you must determine whether quota deduction is to be activated for each attendance or absence type. With quota deduction activated, the attendance or absence is deducted from quotas according to the specified quota deduction rules. These quota deduction rules are also assigned to the counting rule.

You need to define the counting rules for attendances and absences to determine payroll days and hours in Customizing. The counting rule is applied on the basis of the absence days and hours, which the system calculates using the planned hours specified in the work schedule.

#### **Counting Rules**

#### In a counting rule, you need to define the following specifications:

#### Required conditions:

You need to define the conditions that must be fulfilled for the corresponding counting rule to be used.

#### These include the following conditions:

- Conditions for the current day (day of week, public holiday class)
- Conditions for the work schedule (classification of daily work schedules and period work schedules)
- Conditions for planned hours (> = 0)
- Conditions for attendance and absence (full-day, partial-day)

#### Specifications for calculating payroll days and hours:

The counting rule needs to define how the payroll days and hours are calculated. Quota multipliers and rounding rules are used in the calculation.

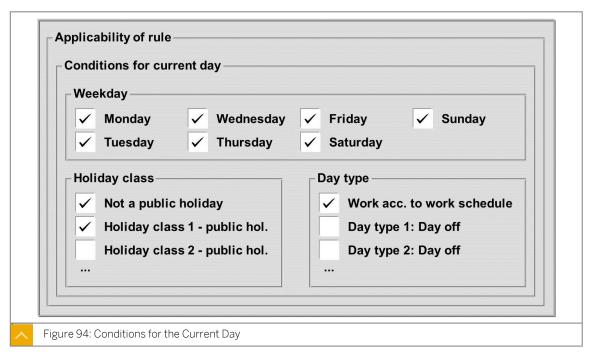
#### Specifications for quota deduction:

For quota deductions, you can assign quota deduction rules to a counting rule.

A counting rule can consist of several individual rules. These individual rules are distinguished by their sequential number. The system searches through the individual rules until the conditions stated in one of the rules is met. The rule is then applied to the calculation.

#### **Conditions for the Current Day**





You can define the days on which a counting rule for absences and attendances is valid and counted in the *Conditions for current day* section. In this section, you select the characteristics that the day must have for the counting rule to apply.

#### A current day can have the following characteristics:

- The day of the week (Monday to Sunday)
- The public holiday class (blank, 1 9)
- The day type (workday or day off)

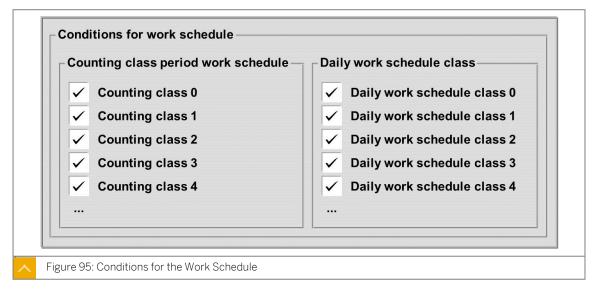


#### Note:

You can select more than one option within a block. For the rule to be valid, at least one of the options must be selected for the block that is displayed.

#### Conditions for the Work Schedule





Depending on the type of work on a day or the work pattern, you can calculate the duration of absences and attendances differently.

You can specify the period work schedules or daily work schedules to which the counting rule is to be applied in the *Counting class period work schedule* and the *Daily work schedule* classes. You can select from counting classes 0 to 9 for the period work schedules. Similarly, you can select from classes 0 to 9 for the daily work schedule classes. Different counting rules can be set up for different period work schedules, as well as for different daily work schedules. You can select more than one option within a block.

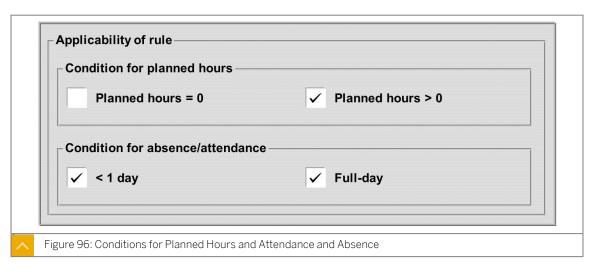


#### Note:

You assign period work schedules to counting classes in the *Define Counting Classes for the Period Work Schedule* activity in Customizing.

#### Conditions for Planned Hours and Attendance and Absence





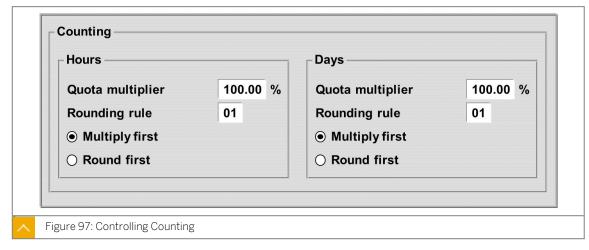
You can limit the validity of the counting rule according to the *Conditions for planned hours* and *Conditions for attendance/absence*. To define the condition for the planned hours from

the daily work schedule, you can specify whether the planned hours must be equal to or greater than 0. To define the condition for the attendance and absence, you can specify whether the counting rule is valid for full-day or partial-day attendances and absences.

You can select more than one option within a block.

#### **Counting Controls**





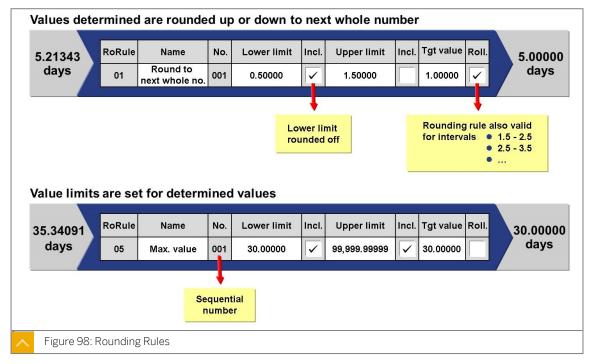
After specifying the conditions for applying the counting rule, you need to define how the payroll days and hours are to be calculated when the specified conditions apply. You can specify different criteria for counting payroll days and payroll hours in the *Hours* and *Days* sections, respectively.

### The table describes the counting criteria you can define for counting payroll hours and days:

Counting Criteria	Description
Quota multiplier	This can be specified for each time unit. A quota multiplier of 100% means that the absence hours (or days) are weighted 100%.
Rounding rule	This can be assigned to round the attendance and absence values up or down.
Multiply first or round first	These options are used to specify the sequence in which multiplying and rounding should take place when counting hours and days.

#### **Rules for Rounding Days or Hours**





When counting payroll days and hours, you can use rounding rules to round the determined values up or down. You can define several rounding rules, which can further consist of several complementary subrules. The system runs through the subrules until one is met.

#### The table describes the fields that you need to define for a rounding rule:

Rounding Criteria	Description
RoRule (Rounding Rule)	In this column, the system displays a two- digit number that uniquely identifies a round- ing rule.
Lower limit Upper limit	In these columns, you specify the lower and upper limits for the rounding interval in a rounding rule.
Incl. (Include)	In the two <i>Incl.</i> columns, you activate the switch to specify whether the lower and upper limits are to be included when calculating the interval.
Tgt. Value (Target value)	In this column, you specify the value to which you want to round up or down.
Roll	In this column, you indicate if the interval is to be rolled (copied) to all subsequent intervals by activating the switch. In this case, the duration of the interval is always taken into account.

For example: According to rounding rule 01, all values between 0.5 inclusive and 1.5 exclusive are rounded to the target value 1. The interval is defined as rolling and is therefore carried over to the following intervals.



#### Note:

Rounding rules can be assigned in counting rules. Rounding rules can also be used elsewhere; for example, to determine how absence entitlements are rounded.



#### **LESSON SUMMARY**

You should now be able to:

• Define counting rules to ensure employee attendances and absences are recorded correctly

### Unit 6 Lesson 2

### **Assigning Counting Rules to Absence Types**

#### **LESSON OVERVIEW**

This lesson explains the process of assigning a counting rule to an attendance or absence type.

#### **Business Example**

To ensure that the attendances and absences of employees are calculated correctly, you need to apply counting rules to attendance and absence types. For this reason, you require the following knowledge:

• An understanding of how to assign counting rules to attendance and absence types



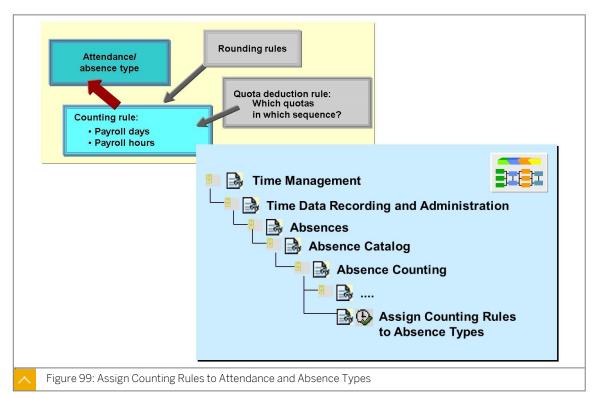
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Assign a counting rule to an absence type

#### **Rules for Counting Absence Types**





To ensure the duration of attendances and absences are calculated by using the counting rule, you must assign a counting rule to each attendance and absence type. You must

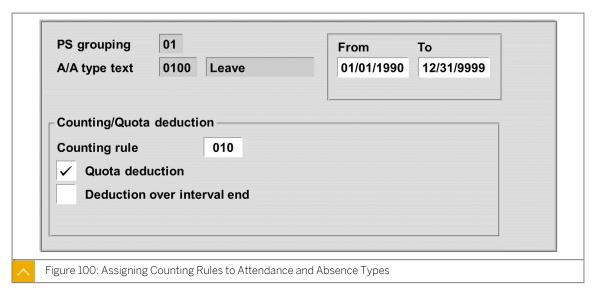


determine whether the quota deduction function is to be activated for each attendance and absence type.

You can find the relevant Customizing activities under Time Management  $\rightarrow$  Time Data Recording and Administration  $\rightarrow$  Absences  $\rightarrow$  Absence Catalog  $\rightarrow$  Attendance Counting and, similarly, under Attendances  $\rightarrow$  Attendance Counting.

#### **Quota Deductions**





In the *Counting/quota* deduction section of the screen, you select the counting rule for the corresponding attendance or absence type.

You also activate quota deduction if you want the corresponding attendance or absence type to be deducted from quotas in the *Absence Quotas* infotype (2006) and the *Attendance Quotas* infotype (2007).

For example: The absence type *Leave* (0100) references the counting rule *010* to calculate durations. This absence type, in turn, can be assigned the rounding rules and deduction rules of the quota types that are to be deducted by this absence type. Quota deduction is activated in this case. In this way, a deduction is made from the existing quotas according to the quota deduction rule assigned to counting rule *010*.



#### **LESSON SUMMARY**

You should now be able to:

Assign a counting rule to an absence type

### Unit 6 Lesson 3

# Utilizing Daily Work Schedule Variants to Count Absences

#### **LESSON OVERVIEW**

This lesson explains how daily work schedule variants are used to count absences.

#### **Business Example**

Employees in your company work various hours and are assigned work schedules to reflect the time they are scheduled to work. As the time administrator, you are responsible for the set up of the system to ensure absences are counted correctly. To accomplish this task, you require the following knowledge:

• An understanding of work schedule variants



#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Utilize daily work schedule variants to count absences

#### **Daily Work Schedule Variants**



Planned working hours according to work schedule	8	8	8	8	4	
Basis for counting particular attendances/ absences	7.2	7.2	7.2	7.2	7.2	

 $\wedge$ 

Figure 101: Daily Work Schedule Variants

The absence days and hours determined by the planned working hours stored in the work schedule are used as a basis for counting payroll days and hours. Occasionally, you may not

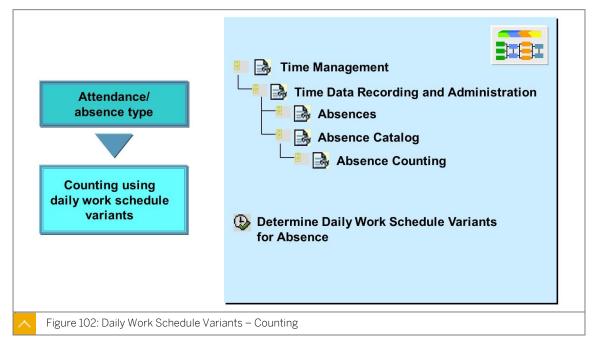


want the counting of certain full-day attendances or absences to be based on the planned working hours stored in the work schedule. You can influence the number of planned hours by assigning an applicable daily work schedule variant.

For example: Employees in your company work eight hours each day from Monday through Thursday, and work four hours on Friday. If you want the absence hours for illness to be determined using averages, you can specify a daily work schedule variant such as variant A with 7.2 hours.

#### Daily Work Schedule Variants - Counting

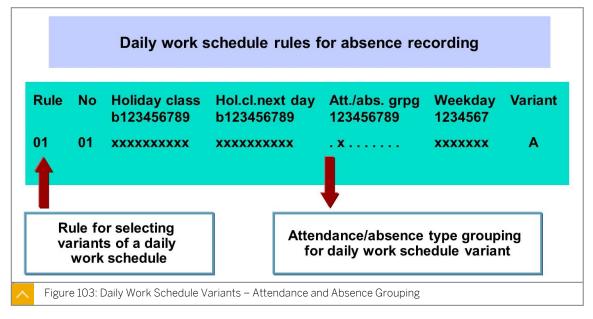




To use a special daily work schedule variant to count an attendance or absence, ensure that the variant exists and is referenced according to the rules defined. You can access the relevant Customizing activities under  $Time\ Management o Time\ Data\ Recording\ and\ Administration o Absences o Absence\ Catalog o Absence\ Counting\ and, similarly under Attendances o Attendance\ Counting\ .$ 

#### Daily Work Schedule Variants - Attendance and Absence Grouping





Before you create the counting rule for daily work schedule variants, you must first check whether your attendance and absence type is correctly grouped. This grouping is only required for the attendance or absence types that you want to count using variants. Attendance and absence types that are to be handled in the same way must be grouped together in a grouping. The value of the grouping is queried when variants are selected during attendance or absence counting.

#### The counting rules are created taking the following conditions into account:

- Public holiday class of the current day
- Public holiday class of the following day
- · Grouping of the absence or attendance types for the daily work schedule variant
- Weekday

The rule to be used for attendance or absence counting using daily work schedule variants must be assigned to the daily work schedule.



#### **LESSON SUMMARY**

You should now be able to:

• Utilize daily work schedule variants to count absences

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# Unit 6

# **Learning Assessment**

L.	All attendances and absences are counted using the same rule.
	Determine whether this statement is true or false.
	True False
2.	Payroll days and hours are used for deducting quotas.
	Determine whether this statement is true or false.
	True
	False
3.	is the value to which you want to round up or down.  Choose the correct answer.
	A Target value  B Lower limit  C Upper limit
4.	To ensure that the duration of attendances and absences is calculated correctly, you apply the counting rules as well as quota deductions to each attendance and absence type.
	Determine whether this statement is true or false.
	True
	False
5.	Attendance and absence types that are to be handled in the same way must be grouped together in a grouping for counting using daily work schedule variants.
	Determine whether this statement is true or false.
	True
	False

# **Learning Assessment - Answers**

1.	All attendances and absences are counted using the same rule.
	Determine whether this statement is true or false.
	True
	X False
2.	Payroll days and hours are used for deducting quotas.
	Determine whether this statement is true or false.
	X True
	False
3.	is the value to which you want to round up or down.
	Choose the correct answer.
	X A Target value
	B Lower limit
	C Upper limit
4.	To ensure that the duration of attendances and absences is calculated correctly, you apply the counting rules as well as quota deductions to each attendance and absence type.
	Determine whether this statement is true or false.
	X True
	☐ False
	L Taise

5.	Attendance and absence types that are to be handled in the same way must be grouped together in a grouping for counting using daily work schedule variants.
	Determine whether this statement is true or false.
	X True
	False

# UNIT 7

# **Attendance and Absence Quotas**

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#### **UNIT OBJECTIVES**

- Set up quota types for an absence to ensure correct time tracking and reporting
- Set up quota deduction rules to ensure quotas are updated correctly
- Assign quota deduction rules to counting rules
- Determine the quota accrual process to ensure entitlements are accurate
- Set up a quota type selection rule group to allocate rules to employees
- Define base entitlements for employee absences
- Set up validity and deduction intervals
- Set up rules to control how quotas are reduced
- Create rounding rules to control how time is calculated
- Set up work schedule generation rules
- Use a report to automatically generate quotas for employees
- Outline the uses of the quota compensation infotype

### Unit 7 Lesson 1

### **Setting Up Attendance and Absence Quotas**

#### **LESSON OVERVIEW**

This lesson explains how to configure attendance and absence quota types for your employees.

#### **Business Example**

Employees are entitled to various absences (such as vacation) and attendances (such as training) that have a specific number of days assigned to them. You need to configure the attendance and absence quotas to ensure they are reduced correctly as the absences and attendances are taken. For this reason, you require the following knowledge:

• An understanding of the attendance and absence quota types



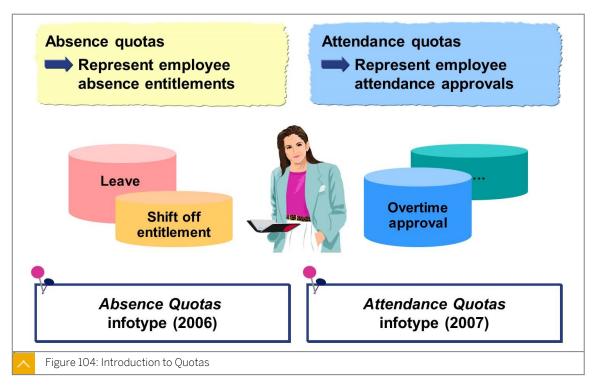
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

· Set up quota types for an absence to ensure correct time tracking and reporting

#### **Quota Basics**





Employees in your company are entitled to entitlements such as leave and additional training. These types of entitlements can be stored in quotas, from which attendances and absences are deducted. An absence quota is an employee's time-limited entitlement to an absence.

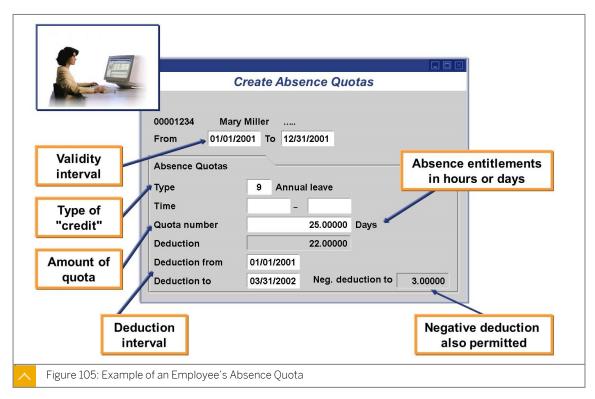
Similarly, an attendance quota is an employee's entitlement to an attendance. Absence and attendance quota types are used to represent these entitlements in the system.

You set up employees' absence entitlements, such as standard annual leave and non-working shift entitlement, in the Absence Quotas infotype (2006).

You set up approvals for attendances such as overtime in the Attendance Quotas infotype (2007). These approvals can be queried in Time Evaluation.

#### Attendance and Absence Quota Types





#### Attendance or absence quotas include the following characteristics:

#### Validity period:

The validity period indicates the dates assigned to a quota. For example, a quota with a validity period of January 1, 2012 to December 31, 2012 is valid for the specified period of time.

#### **Deduction interval:**

The deduction interval for a quota specifies the period in which employees can use the quota. The deduction from and deduction to dates of the quota do not have to match the validity period.

#### Quota type:

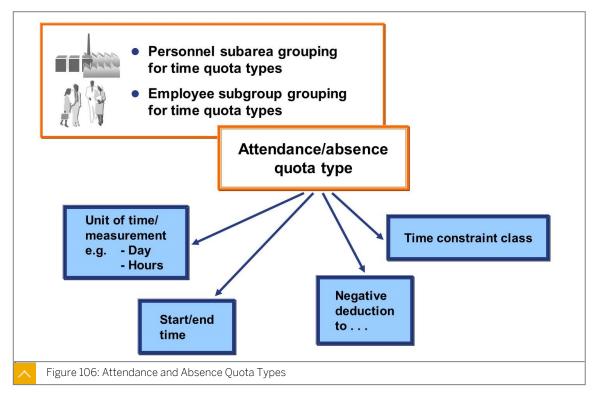
The type of quota, such as standard annual leave and educational leave, is determined by the quota type.

#### Quota number:

The number of days or hours included in the quota.

#### Attendance and Absence Quota Types: Customizing





When you customize a quota type, you define whether the quota is managed in days or hours. You also specify whether a deduction beyond the entitlement is permitted.

Attendance and absence quota types are defined in Customizing based on the personnel subarea and employee subgroup groupings for time quota types.

#### Attendance and absence types include the following groupings:

#### Employee subgroup grouping for time quota types:

This is a breakdown of employee subgroups for which the same attendance and absence quota types are valid.

#### Personnel subarea grouping for time quota types:

This is a breakdown of personnel subareas for which the same attendance and absence quota types are valid.

For each quota type, you specify the time unit (days or hours) you want to use to manage the quota. If you want to restrict the validity of entitlements to certain clock times, you can specify an applicable time interval for each quota type. If this time interval is adopted when you create a quota for an employee, the entitlement applies only within the specified time interval.

You can also specify the amount to which a quota can be deducted beyond its entitlement. The amount specified for negative deduction also appears in the Attendance Quotas infotype (2007) and Absence Quotas infotype (2006).

Each attendance or absence quota type is assigned a time constraint class, which is then checked if time infotypes collide. Absence quota types can be locked for compensation.



#### **LESSON SUMMARY**

You should now be able to:

• Set up quota types for an absence to ensure correct time tracking and reporting

### Unit 7 Lesson 2

### **Assigning Quota Deduction Rules**

#### **LESSON OVERVIEW**

This lesson shows you how to assign quota deduction rules to ensure quotas are correctly updated.

#### **Business Example**

In your company, you are responsible for tracking attendances and absences. To ensure the accuracy of information, you need to make sure that when your employees take leave, each leave quota is deducted accordingly. For this reason, you require the following knowledge:

- An understanding of how to assign quota deduction rules
- An understanding of the different deduction rules for attendance and absence quotas



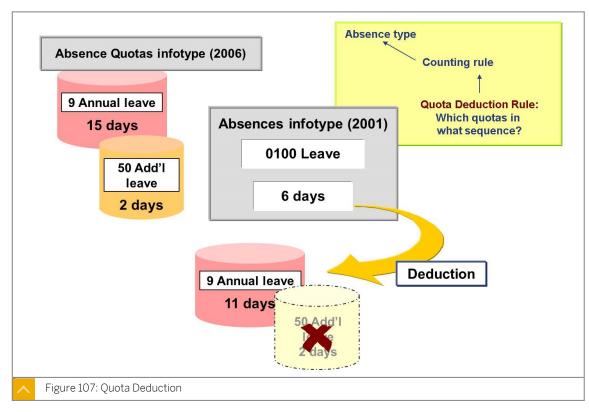
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

- Set up quota deduction rules to ensure quotas are updated correctly
- Assign quota deduction rules to counting rules

#### **Quota Deduction Rules**







Absences are entered in the Absences infotype (2001), and the absence type is specified. Attendances are entered in the same way in the Attendances infotype (2002), where the attendance type is specified.

Absence quotas are specified with their corresponding quota types in the Absence Quotas infotype (2006), and attendance quotas in the Attendance Quotas infotype (2007).

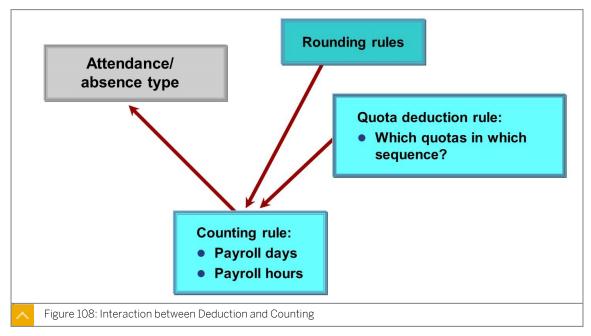
Quotas, and the attendances and absences to be deducted from them, are stored for a specific key date. For this purpose, you must define number range intervals in Customizing.

If quotas are to be deducted by attendances and absences, you have to specify which absence or attendance type is deducted from which quotas and in which sequence.

Consider an example to understand quota deduction. An employee's annual entitlement to leave is stored in the Absence Quotas infotype (2006) in combination with the relevant quota type. The employee has 25 days of standard annual leave (represented by quota type 9), as well as 3 days of additional leave (represented by quota type 9). If the employee takes leave (absence type 9), you must specify from which quota this absence type 900 is to be deducted and in which sequence the applicable quotas are to be deducted.

#### Interaction between Deduction and Counting





An attendance/absence type can be deducted from a quota only if a relationship already exists between the attendance/absence type and the applicable quota.

This relationship is established by an assignment made in Customizing under *Time Management*  $\rightarrow$  *Time Data Recording and Administration*  $\rightarrow$  *Managing Time Accounts Using Attendance/Absence Quotas*  $\rightarrow$  *Quota Deduction Using Attendances/Absences*.

A counting rule is assigned to the attendance/absence type to determine the payroll hours and days for the duration of this attendance/absence. In turn, quota deduction rules are assigned to the counting rules to determine the quotas from which the attendance/absence type is to be deducted, and the sequence of quotas.

The Activate Quota Deduction option specifies whether or not quota deduction is to take place for each attendance/absence type. If you activate this option when assigning a counting rule to an attendance/absence type, the attendance/absence type is deducted from the quota according to the quota deduction rule stored in the counting rule.

If the quota deduction option is not activated for a particular attendance/absence type, the quota deduction rule assigned to the counting rule does not apply to this attendance/absence type.

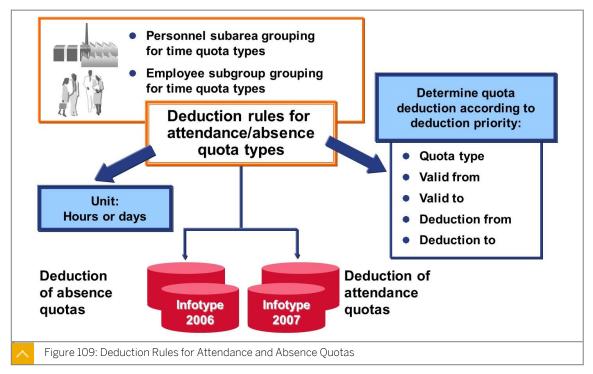


#### Note:

A rounding rule can also be assigned to a counting rule to round the payroll hours and days determined.

#### **Deduction Rules for Attendance and Absence Quotas**





The sequence for deducting quotas of different quota types is specified in the deduction rules. This sequence can be determined depending upon various criteria such as the quota type, which can be assigned priorities. In this way, you can define a specific sequence of quota types.

#### These deduction rules are based on the following groupings:

- Employee subgroup grouping for time quotas
- Personnel subarea grouping for time quotas

The deduction rule is indicated by a 3-digit number.

#### **Deduction Rule for Absence Quotas**



O Hours	• Days		
	Quota sequence	)	
Absence quota type	Quota text		Unit
11	Challenged EE Leave	eave Days	
9	Annual leave	ve Days	
	types in ascending order types in descending orde	r	
		r	
O Sort all other quota	types in descending orde	r ● Ascending	<b>○</b> Descending
<ul><li>Sort all other quota</li><li>Deduction priority</li><li>Absence quota types</li></ul>	types in descending orde		
O Sort all other quota  Deduction priority  Absence quota types  Valid from date	Priority 1  Not relevant	<ul><li>Ascending</li></ul>	O Descending

The unit (hours or days) of the quota types to be deducted is selected in the deduction rule. This unit must be the same unit as in the quota types to be deducted.

Using the deduction priority, you can set priorities for deductions based on various criteria.

#### Examples of such criteria are as follows:

- Quota type
- · Validity start/end
- Deduction start/end

You can store a specific sequence for quota deductions (up to 100 quota types in a certain sequence). If you want quotas to be deducted that are not listed explicitly, you can specify the sequence for subsequent deduction. The deduction sequence can be descending or ascending, according to the quota type. First, the specific sequence is used, and then the sequence for further deduction. You have to set a priority for the quota type so that this specific sequence or the quota type sequence for next deduction is taken into account. The deduction priority controls the priority of quotas if more than one quota exists for the same absence. It is primarily used in the deduction rule.



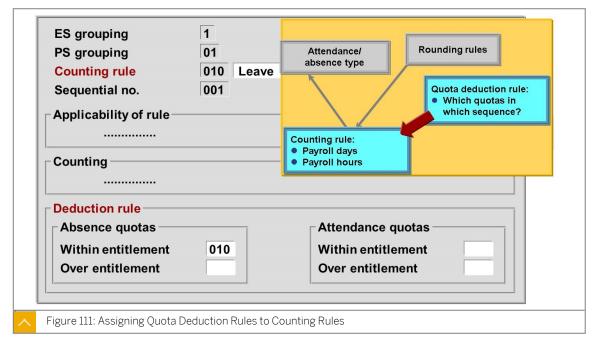
#### Note:

If the deduction sequence no longer corresponds to the rule as a result of subsequent cancellations, you can use the *RPTBPC10* report to restore it.

## **Quota Deduction Rules: Assignment**

#### **Quota Deduction Rules and Counting Rules – Assignment**





Quota deduction rules are assigned to counting rules. Rules governing the deduction of absence quotas and attendance quotas are assigned to a counting rule.

The deduction rules for absence quotas and attendance quotas are each specified in separate areas.

You have options in each area for specifying deduction rules.

## You can specify deduction rules that perform the following functions:

- Govern the deduction of quotas up to the existing entitlement in the Absence Quotas infotype (2006) and Attendance Quotas infotype (2007).
- Regulate the deductions from quotas over and above the existing quota entitlement.



## Note:

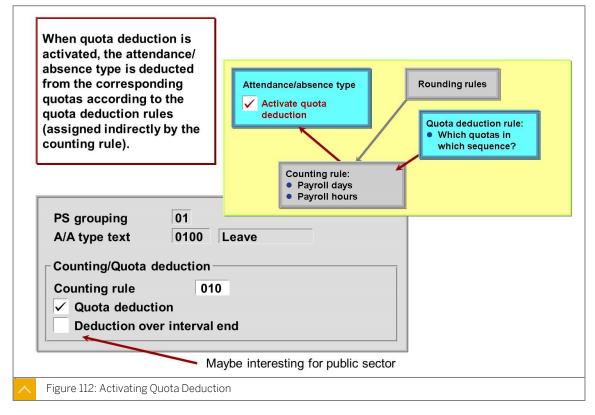
As a prerequisite, there must be corresponding quotas with a negative lower deduction limit in the infotypes for the relevant period [Negative deduction to field in the Absence Quotas infotype (2006) and Attendance Quotas infotype (2007)].

The deduction rules in the *Within entitlement* and *Over entitlement* fields in the counting rule must deduct from attendance or absence quotas using the same time unit. In contrast, deduction rules for absence quotas and those for attendance quotas can use different time units.

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#### **Quota Deduction: Activation**





To assign a counting rule to an attendance/absence type for determining payroll hours and days, you use the Assign Counting Rules to Absence Types (or Assign Counting Rules to Attendance Types) Customizing activity. You assign a counting rule to the attendance/absence type in the Counting or Quota Deduction section.

To activate quota deduction, set the *Quota deduction* indicator. The system then accesses the applicable deduction rules in the counting rule (the quota deduction rules for absence quotas in case of absence types, and the quota deduction rules for attendance quotas for attendance types). The corresponding attendance/absence type is deducted from the quota in the Absence Quotas infotype (2006) and Attendance Quotas infotype (2007) according to the specifications for quota deduction rules.

If you want quota deduction to be continued after the end date of the quota interval, activate the *Deduction over interval end* field. The deduction is carried out as long as the start date for the applicable attendance/absence record lies within the deduction interval of the quota.

For example, for the Leave absence type, the counting rule 010 is specified for determining payroll days and hours. Rounding and deduction rules are assigned to this counting rule. Because quota deduction is activated for the Leave absence type, the recorded time is deducted from the absence quota according to the deduction rules for absence quotas stored in the counting rule.



#### **LESSON SUMMARY**

You should now be able to:

- Set up quota deduction rules to ensure quotas are updated correctly
- Assign quota deduction rules to counting rules

## Determining Default Values to Grant Absence Entitlements

#### **LESSON OVERVIEW**

This lesson shows you how to set up the system to determine default values for absence entitlements.

### **Business Example**

Employees in your company earn absence entitlements, such as vacation, which are maintained in the system as quotas. The system must be set up to enable the accrual and granting of these absence entitlements. You are responsible for maintaining absence quotas and must understand the options available to accrue entitlements for employees and grant these entitlements to employees. For this reason, you require the following knowledge:

An understanding of quota accruals



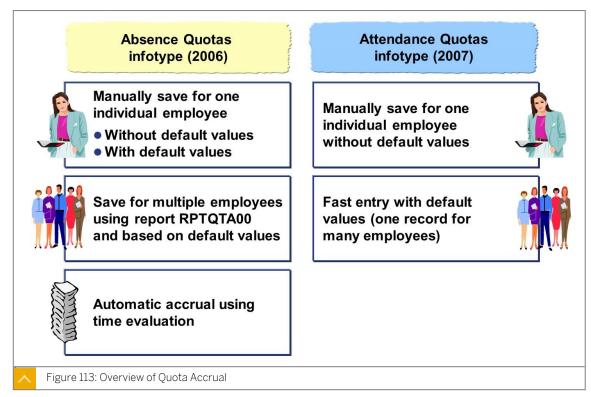
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Determine the quota accrual process to ensure entitlements are accurate

### **Quota Accruals**





## The various methods available for granting absence entitlements to employees are as follows:

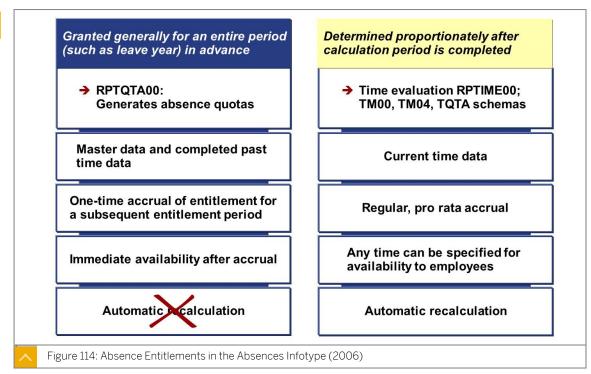
- Record absence entitlements manually in the Absence Quotas infotype (2006), where absence entitlement is granted to each employee individually.
- Set default values for entitlements when creating records in the Absence Quotas infotype (2006).
- Allow absence entitlements to be accrued automatically. The entitlement that is determined has to be changed only in exceptional cases.

### The following methods are available to accrue time-off credits automatically:

- Use the RPTQTA00 report to generate time-off entitlements for groups of employees that are granted in advance. For example, annual leave is granted in advance for one calendar year.
- Use time evaluation (*RPTIMEOO*) to set up time-off entitlements that are determined proportionately after a calculation period is completed. For example, the standard leave entitlement for each employee increases at the end of a calculation period. In this process, rather than the general granting of leave in advance, employees receive their time-off entitlement after they have worked for it. You must be using time evaluation to enable these calculations.

#### Absence Entitlements in the Absences Infotype







Note:

Attendance quotas are specified manually in the *Attendance Quotas* infotype (2007).

The method used for accruing absence entitlements depends upon whether the absence entitlement is granted in its entirety in advance or proportionately after a calculation period has been completed.

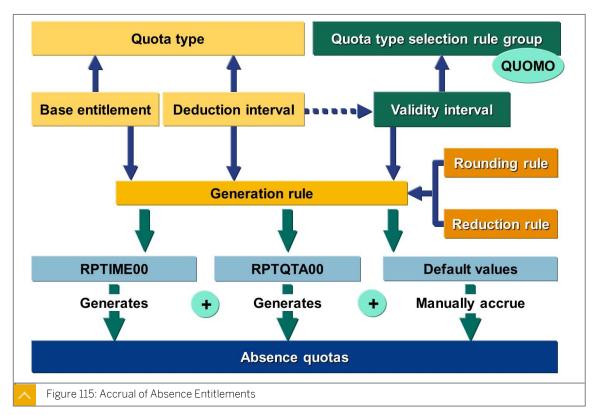
Where an absence entitlement is granted in its entirety in advance, the total entitlement for a subsequent period (such as a calendar year) is accrued at one time in advance. The entitlement is immediately available in the Absence Quotas infotype (2006). The system can calculate the entitlement on the basis of the employee's HR master data, such as age or seniority. If you use time evaluation, you can take account of completed time data from past periods.

If an absence entitlement is granted in its entirety, you can overwrite the generated data records in the Absence Quotas infotype (2006) manually.

If you use time evaluation, the system can determine time-off entitlements proportionately after a calculation period is completed. In this method, employees are granted their entitlements only after they have already worked for them. Current time data can also be used as the basis for determining entitlement. For example, according to your company policy, an employee is entitled to 1.5 days of time-off entitlement for each payroll period provided the employee worked the planned hours. The periods for which the credit is calculated and the time at which the quota is stored in the Absence Quotas infotype (2006) are independent of one another.

### **Accrual of Absence Entitlements**





Absence quotas can be filled using generation rules or default values.

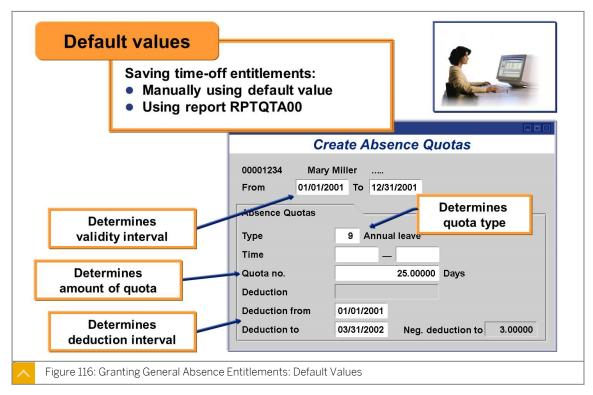
The figure provides an overview of the various elements that play a part in the accrual of absence entitlement, and the different methods used for accrual.

Generation rules for granting lump-sum entitlement to time-off credits and those for automatic quota accrual using time evaluation are mainly set up in the same Customizing

activities. In Customizing, choose: Time Management  $\rightarrow$  Time Data Recording and Administration  $\rightarrow$  Managing Time Accounts Using Attendance/Absence Quotas  $\rightarrow$  Calculating Absence Entitlements.

### **General Absence Entitlements: Granting**





For all quota types, you must specify whether they are to be accrued automatically using time evaluation, or manually, or using the report RPTQTA00 (Generate Absence Quotas).

In Customizing, you must specify that quota types accrued either manually or using the RPTQTA00 report are not to be generated in time evaluation. This must be done before absence entitlements are calculated.

When granting general absence entitlements in advance using default values or the report RPTQTA00, the system uses Customizing tables to determine the following information:

- Quota type
- Quota number
- · Validity period
- Deduction period



## **LESSON SUMMARY**

You should now be able to:

• Determine the quota accrual process to ensure entitlements are accurate

## **Setting Up Quota Type Selection Rule Groups**

#### **LESSON OVERVIEW**

This lesson shows you how to determine quota type selection rule groups based on the employee's organizational assignment.

#### **Business Example**

Employees are entitled to different quotas based on their position within the company. As the time administrator, you must ensure employees are assigned the correct quotas. To do this you must set up quota selection rule groups and modify a system feature to automate the assignment of a quota type selection rule group to employees.

For this reason, you require the following knowledge:

- An understanding of how to setup quota type selection rule groups
- An understanding of how to specify a quota type selection rule group based on the feature QUOMO



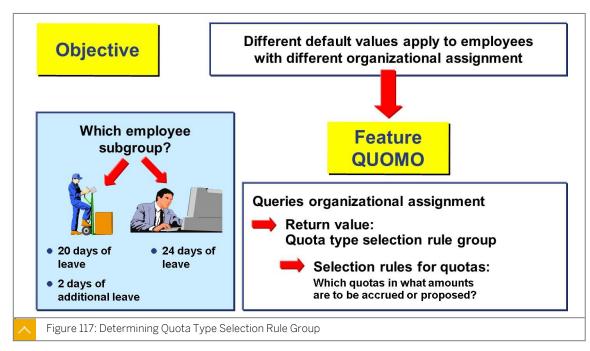
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Set up a quota type selection rule group to allocate rules to employees

#### **Quota Type Selection Rule Group**





You can use the quota type selection rule group to control the absence quota type selection based on the employee's organizational assignment. By using different quota type selection rule groups, you can define different rules for quota selection.

The QUOMO feature determines the quota type selection rule group for manually accrued quotas using default values, and for quotas set up by the report RPTQTA00.

You use the QUOMO feature to define which quota type selection rule group your employees are assigned to, based on their organizational assignment. In a subsequent step, you specify selection rules for the quota type selection rule group to control the absence quota accrual.

For example, salaried employees are granted a standard annual leave of 24 days per year. In contrast, hourly wage earners are granted 20 days of standard annual leave, with 2 days of additional leave. You set up the QUOMO feature to assign a different quota type selection rule group to the different employee subgroups, such as salaried employees and hourly wage earners. These quota type selection rule groups are each assigned quota selection rules that determine what amount of which quotas are to be proposed or accrued.

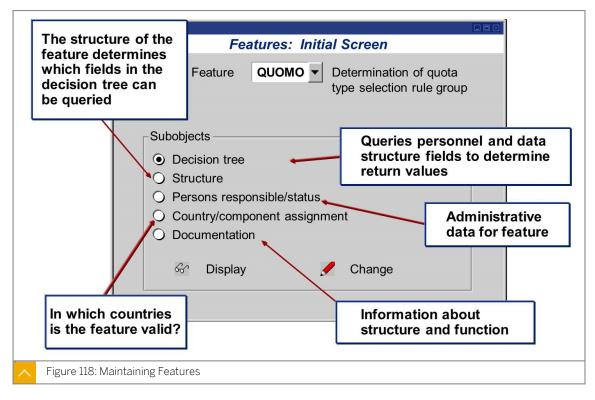


#### Note:

The quota type selection rule group can also be assigned in the Time Evaluation schema to accrue absence entitlements, if Time Evaluation is in use.

#### Features - Maintenance





Features are objects within the SAP system that determine a particular value, called a return value or result, by querying various personnel or data structure fields.

This return value is used to determine default values or control certain system processes. In this way, features improve system flexibility.

#### You can use the following options to access feature maintenance:

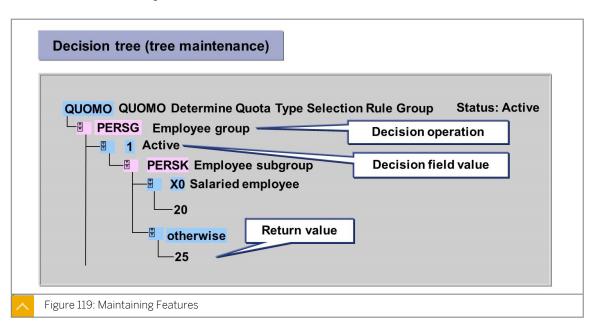
- Branch directly to feature maintenance in Customizing for Time Management or Payroll.
   The feature called depends on whether you are in the Time Management section of Customizing or the Payroll section of Customizing.
- Call the feature maintenance transaction, PEO3, directly. The *Features: Initial* screen is displayed.

## Features are defined by the following elements, which must be maintained in the following sequence when creating a feature:

- 1. Person responsible for the feature
- 2. Documentation for the feature
- 3. Country/component assignment of the feature
- 4. Structure of the feature
- 5. Decision tree for the feature

#### **Decision Tree for the QUOMO Feature**





In the decision tree for the QUOMO feature, you define which quota type selection rule group is valid for which employees. The decision rule in the feature can be structured according to various organizational elements, such as company code, personnel area, employee group, employee subgroup, and so on.

Decision trees can be simple or very complex, depending on their function, number of fields, operations, and the decision criteria included.

In the example shown in the figure, the employee group is queried first; for the employee group 1 (Active), the employee subgroup is queried. For the employee group 1 and the employee subgroup X0 ( $salaried\ employees$ ), the quota type selection rule group 20 is set. For all other employee subgroups (the otherwise node), the quota type selection rule group 25 is set. This enables you to differentiate between employees with different organizational assignments.





#### Note:

If you prefer the table maintenance layout, you can switch to it by choosing  $\emph{View}$  in the menu.



## **LESSON SUMMARY**

You should now be able to:

• Set up a quota type selection rule group to allocate rules to employees

## **Defining Base Entitlements**

#### **LESSON OVERVIEW**

This lesson explains how to set up a base entitlement for a quota type on the basis of an employee's seniority.

## **Business Example**

Employees in your company are entitled to different leave entitlements based on their seniority. As the time administrator, you are responsible for ensuring the correct base entitlements are assigned to employees. To set up these entitlements, you use a base entitlement rule and apply it to the quota type for the leave entitlement. For this reason, you require the following knowledge:

• An understanding of base entitlements



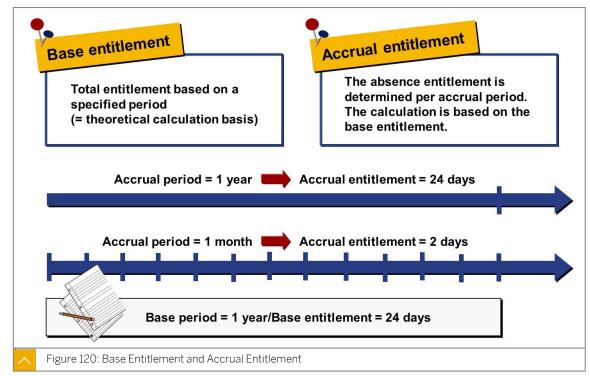
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Define base entitlements for employee absences

#### **Base Entitlement and Accrual Entitlement**







#### **Base Entitlement Period**

For each absence quota type, you can store a total entitlement (in days or hours) based on a specified period such as a calendar year. The base entitlement is a theoretical value used as the basis for calculating the accrual entitlement.

#### **Accrual Period**

The accrual period describes the interval that applies when calculating the absence credit. The accrual period can be selected independently of the base period (such as payroll period, month, and so on). The accrual and base periods can also be identical.

#### **Accrual Entitlement**

The accrual entitlement is the absence entitlement calculated for an accrual period. The calculation of the accrual entitlement is based on the base entitlement. By comparing the base period and the accrual period, the system converts the base entitlement to the accrual period, and, in this way, determines the accrual entitlement.

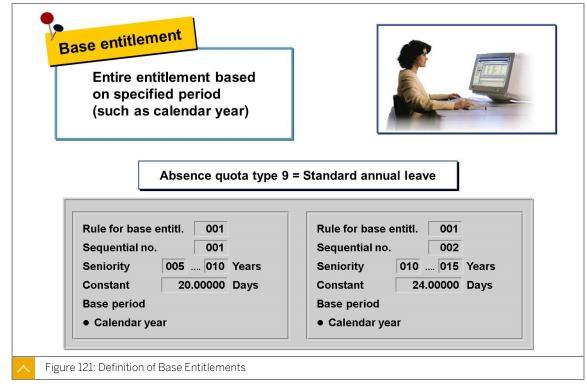
For example, the accrual entitlement for a base entitlement of 24 days per year, based on an accrual period of 1 month, is 2 days.

#### You can set the accrual period based on the following factors:

- Collective agreements
- · Legal provisions
- Internal company policy

#### **Definition of Base Entitlements**





The base entitlement represents the calculation base used to calculate the proportionate absence entitlement for each accrual period.

The base entitlement can be determined on the basis of an employee's age or seniority. If you want to define different base entitlements for each age or seniority interval, you can summarize these in one rule. The individual intervals of the rule are differentiated by the assigned sequential number. The different base entitlements are distinguished from each other by open-ended intervals.

# The base entitlement is related to a fixed period. It can be determined in one of the following ways:

- Based on a calendar year or any period of your choice
- Determined using time evaluation or payroll periods
- · Determined on the basis of the accrual period



#### **LESSON SUMMARY**

You should now be able to:

Define base entitlements for employee absences

## **Setting Up Validity and Deduction Intervals**

#### **LESSON OVERVIEW**

This lesson explains the set up of validity and deduction intervals used to ensure leave entitlements are handled correctly.

#### **Business Example**

Employees in your company are entitled to different leave entitlements for different validity periods. In your company, annual leave, for example, has a validity period of the current year. Employees must use this leave entitlement by the end of March of the following year. As the time administrator, you must set up appropriate validity and deduction intervals to ensure the leave entitlements are handled correctly in the system. For this reason, you require the following knowledge:

An understanding of validity and deduction intervals



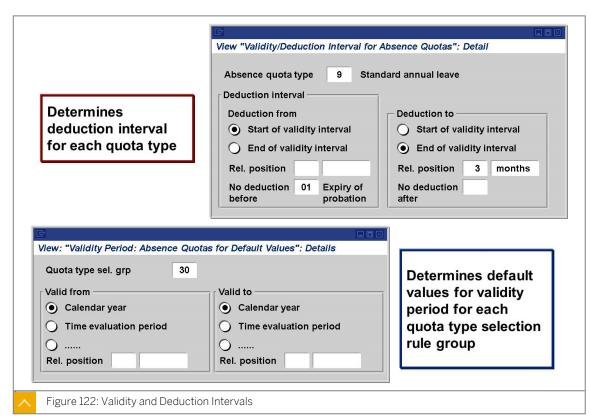
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Set up validity and deduction intervals

### Validity and Deduction Intervals





You can determine absence entitlements using default values or accrue absence entitlements using the RPTQTA00 report. Validity and deduction intervals (periods) for the quota types must be defined.

You determine default values for the validity period for each quota type selection rule group. This means that the same validity period is proposed for all quotas that are proposed for each quota type selection rule group. You set these default values for the validity period for each quota type selection rule group in Customizing in the Set Up Automatic Accrual Using Report RPTQTAOO activity.

The default value for the deduction interval is determined for each quota type. The start and end times for a deduction are defined relative to the validity start and end dates. You set these default values for the deduction period in Customizing in the *Determine Validity and Deduction Periods* activity. The name of the Customizing activity reflects the fact that the validity interval is also specified for the quotas accrued in time evaluation.



#### **LESSON SUMMARY**

You should now be able to:

Set up validity and deduction intervals

## **Setting Up Reduction Rules**

#### **LESSON OVERVIEW**

This lesson shows you how to customize reduction rules to control the handling of quotas.

#### **Business Example**

As a time administrator, you need to define reduction rules to calculate quota entitlements for employees who do not work the entire year. For this reason, you require the following knowledge:

An understanding of the reduction rules



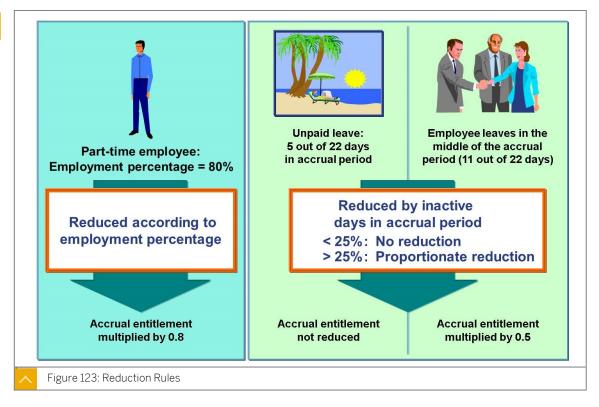
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

· Set up rules to control how quotas are reduced

### **Reduction Rules**





In the *Define Rules for Reducing Quota Entitlements* activity, you define the reduction rules to determine the conditions under which a calculated entitlement is to be reduced.



# Reduction rules are used if employees are not to be granted full entitlement to an absence quota because of one the following reasons:

- They worked part-time.
- They were not employed for the entire period; that is, they had inactive periods of employment because they just started working at the company, or they left the company.
- They had certain absence times that had an inactive day status, such as unexcused absences. You indicate whether an absence is valuated as inactive time by using an appropriate absence type.

Reduced working times can be identified using special absence quotas. You determine in absence quota type selection whether the reduced times are to be omitted or collected in other special absence quotas.



#### **LESSON SUMMARY**

You should now be able to:

• Set up rules to control how quotas are reduced

## **Creating Rounding Rules**

#### **LESSON OVERVIEW**

This lesson explains how to set up the rounding rules used in the counting of recorded time.

#### **Business Example**

As the time administrator, you are responsible for the set up of the system for the recording of employee attendances and absences. When determining total entitlements for employees, you want the system to round values up or down to full days. For this reason, you require the following knowledge:

An understanding of rounding rules



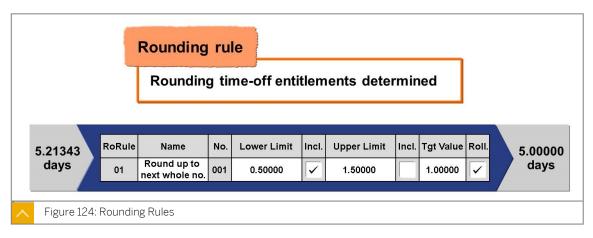
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Create rounding rules to control how time is calculated

## **Rules for Rounding**





In the *Define Rules for Rounding Quota Entitlements* activity, you define rounding rules to round the quota entitlements determined by the system.

You can define several rounding rules. A rounding rule is uniquely indicated by its 2-digit number, and can consist of several complementary subrules. The system runs through the subrules until one is met.

You define an upper and lower limit for the rounding interval in a rounding rule. In the two *Incl.* columns, you activate the switch to specify whether the upper and lower limits are to be included when calculating the interval. You enter the value to which you want to round up or down in the *Target Value* column. In the *Roll.* column, you indicate if the interval is to be rolled, that is, copied to all subsequent intervals, by activating the indicator. In this case, the duration of the interval is always taken into account.



These rounding rules are also used when determining attendance/absence hours and days in attendance and absence counting.



## **LESSON SUMMARY**

You should now be able to:

• Create rounding rules to control how time is calculated

## **Setting Up Generation Rules**

#### **LESSON OVERVIEW**

In this lesson you will learn how to set up the generation rules used to control quotas assigned to employees.

## **Business Example**

As the time administrator, you are responsible for the set up of quota accruals. Employees could have several leave quotas with different quota types based on their organizational assignment. You need to set up the quota accruals by defining generation rules for the quota type selection for each selection rule. For this reason, you require the following knowledge:

• An understanding of generation rules



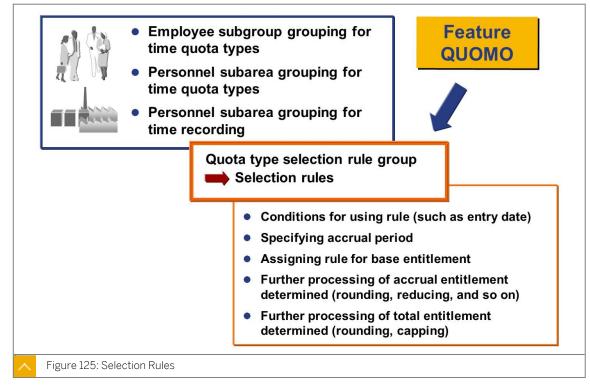
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Set up work schedule generation rules

#### **Selection Rules**





You define rules for the accrual of employee's time-off entitlements in the *Define Generation Rules for Quota Type Selection* activity. The rules for quota selection are defined according to the personnel subarea and employee subgroup groupings.



#### Note:

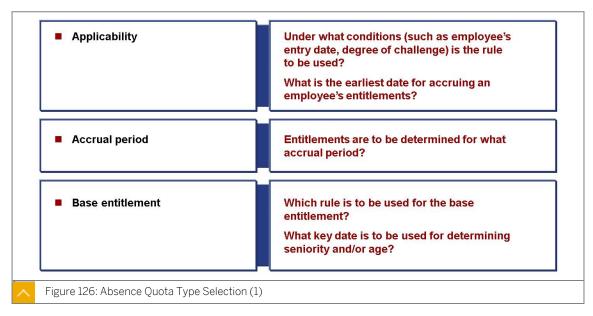
The personnel subarea grouping for time recording is located in the *Time Evaluation* section of Customizing.

These rules are also defined on the basis of a quota type selection rule group. The quota type selection rule group is set in the QUOMO feature based on the employee's organizational assignment. Selection rules are stored for the quota type selection rule group to determine the quotas to be accrued, the amounts, how they are rounded, and so on.

Quotas are either accrued for the applicable employees using the RPTQTA00 report, or default values for creating quotas are determined according to the selection rules.

### Absence Quota Type Selection (1)





## In a selection rule for quota types, you make the following settings:

#### Applicability:

On this tab page, you define the conditions under which the selection rule is to be used. For example, the rule can be used dependent on the employee's hiring date, for employees in a certain challenge group, or for employees with a certain degree of challenge. For example, a challenge group could be set up for severely challenged employees. In addition, you can also specify the earliest date on which the absence entitlement can be granted, such as after a probation period.

#### Accrual period:

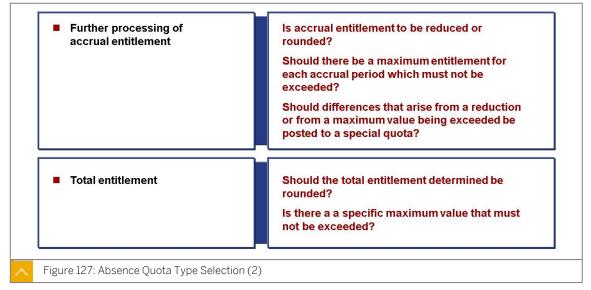
On this tab page, you define the accrual period for determining the entitlements.

#### Base entitlement:

On this tab page, you specify a previously created rule for base entitlement to set the applicable base entitlement (depending on age and seniority, if required). This base entitlement is used to determine the accrual entitlement. You can also specify how age or seniority is to be determined.

### Absence Quota Type Selection (2)





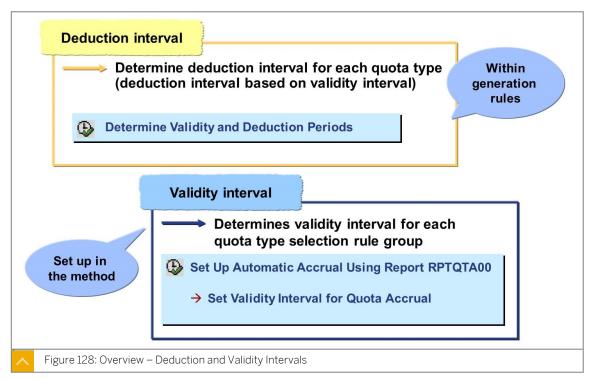
You can determine a preliminary accrual entitlement on the basis of the data on the *Applicability of Rule, Accrual Period*, and *Determining base entitlements* tab pages.

On the Further processing of accrual entitlement tab page, you can specify when accrual entitlement is to be reduced or to be rounded for part-time employees. To do so, you assign an appropriate reduction or rounding rule. You can also set a maximum value that is not to be exceeded.

On the *Total entitlement* tab page, you can enter specifications regarding the total entitlement determined (rounding, maximum value).

### Overview - Deduction and Validity Intervals





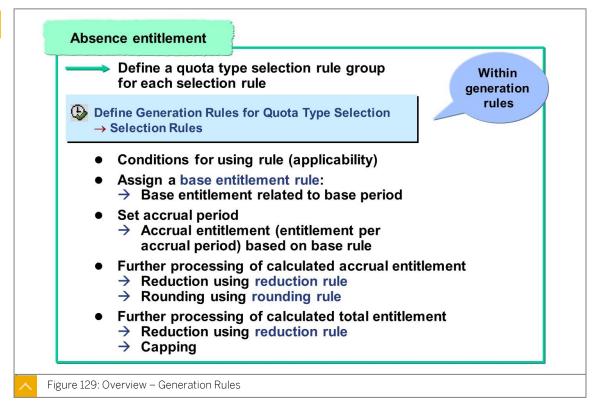
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The figure illustrates the connection between the deduction interval and the validity interval.

Within generation rules, you need to define the deduction interval for each quota type and the validity interval for each quota type selection group.

#### **Generation Rules**





If you want to accrue several quotas with different quota types for employees with a certain organizational assignment, you can specify several selection rules for the corresponding quota type selection rule group.

In each of these selection rules, you specify how quotas of a particular quota type are to be accrued. The accrual depends on the specified conditions, and takes the applicable base entitlement, rounding, capping, and reduction rules into account.

### **Check Customizing Settings**



- A new feature in SAP Enterprise is the option of using the report RPTQUOTA\_CHECK to check your Customizing settings for quotas:
- Selection by:
  - Persons
  - Time management groupings
- Output of:
  - All applicable selection rules with
  - All Customizing settings in this selection rule



 $\wedge$ 

Figure 130: Check Customizing Settings

You use the RPTQUOTA\_CHECK report to display an overview of your Customizing settings. This gives you a quick overview of the settings you made for particular employees or groupings. You can also view detailed information.

To go to the detailed view of a setting, double-click the sheet of paper icon for the row. The selection of the report is based either on persons (by entering a personnel number or quota type selection rule group), or Time Management groupings (by specifying the employee subgroup or personnel subarea groupings).

The report outputs the applicable generation rule (from table T559L) and below it all the settings that were made in the individual rules. This includes: quota types (T556A), base entitlement (T559E), validity and deduction intervals (T559V), reduction rules (T559M), and rounding rules (T559R). In addition, the absences that may cause the quota to be reduced are displayed (Indicated as such in quota generation in table T554S).



### Note:

For more information about the report, see SAP Note 538504 and the report documentation.



#### **LESSON SUMMARY**

You should now be able to:

• Set up work schedule generation rules

## **Generating Absence Entitlements**

#### **LESSON OVERVIEW**

This lesson explains how to automatically generate absence entitlements.

## **Business Example**

In your company, employees are granted different attendance and absence entitlements for vacation leave, educational leave, and so on. You are responsible for the set up of the automatic accrual of employee absence entitlements. For this reason, you require the following knowledge:

• An understanding of how to automatically generate absence entitlements



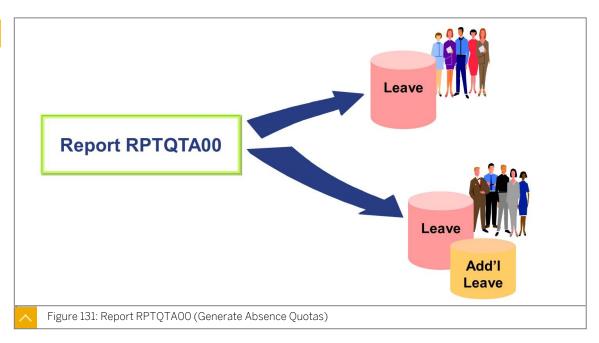
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Use a report to automatically generate quotas for employees

#### **Absence Entitlement Generation**





After specifying generation rules, you can use the RPTQTA00 report to accrue quota entitlements in advance for groups of employees or for individuals. You must specify a generation interval to determine the validity period of the absence quota records to be created.

#### You can specify the validity period in the following ways:

- Enter the start and end dates directly on the report selection screen to set the validity interval.
- Enter the start date. The start date serves as the key date for determining the actual validity interval according to the validity interval specified in Customizing.
- You can make no entries, that is, neither start nor end date. The system date serves as the key date for determining the actual validity interval according to the entries in the Validity Interval for Absence Quotas Customizing table.

### You can run the RPTQTA00 report in the following ways:

## Infotypes:

You can run this report to generate new infotype records directly in the *Absence Quotas* infotype or you can run this report to update existing infotype records.

#### Batch input session:

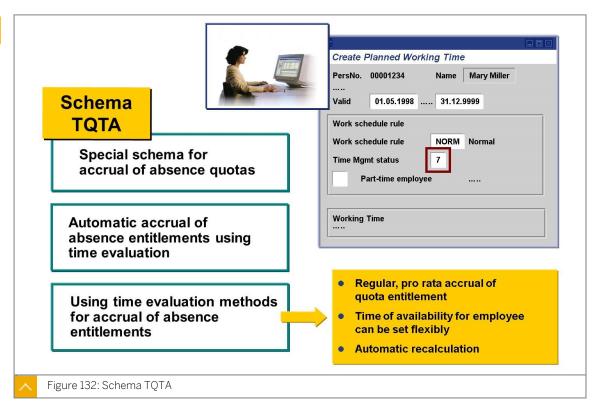
You can run this report in a batch input session to be processed at a later time.

#### Test mode:

You can run this report in test mode, which enables you to check the result in the output list.

### Schema TQTA





If you want to take advantage of time evaluation functions when generating absence entitlements, even if you do not otherwise use time evaluation, you can use the standard schema TQTA.

**For example:** All employees for whom absence entitlements are to be accrued using this schema must have Time Management status 7 in the *Planned Working Time* infotype (0007). In Payroll, employees with status 7 (*Time evaluation without payroll integration*) in the Planned

Working Time infotype 0007 are handled as status 0 (*No time evaluation*) in Time Management.



## **LESSON SUMMARY**

You should now be able to:

• Use a report to automatically generate quotas for employees

## **Outlining Quota Entitlements**

#### **LESSON OVERVIEW**

This lesson explains how to control the payment of an outstanding quota to an employee.

#### **Business Example**

As the time administrator, one of your tasks is to remunerate employees for their unused absence entitlements. For this reason, you require the following knowledge:

An understanding of the Quota Compensation infotype



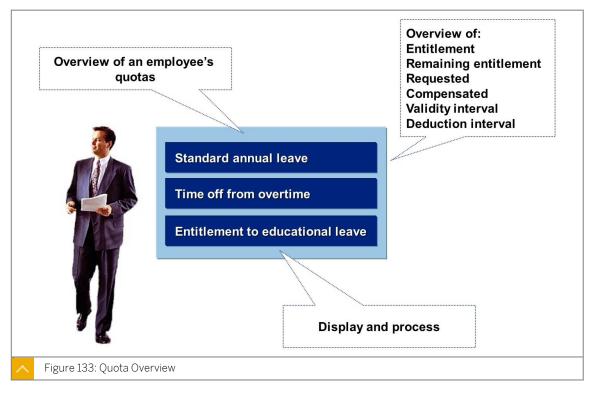
### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Outline the uses of the quota compensation infotype

### **Quota Compensation**





The quota overview allows you to display or maintain the attendance and absence quotas that are assigned to an employee in a particular period. You can access the quota overview from the *Time data* menu. You can use this function to maintain or display an employee's attendance and absence quotas.

## The quota overview includes the following information:

- Total entitlement
- Requested and remaining days
- Validity interval
- · Deduction interval of the quota
- An indicator showing whether the entitlement was accrued manually or automatically

## In the quota overview, you can display and process the following information:

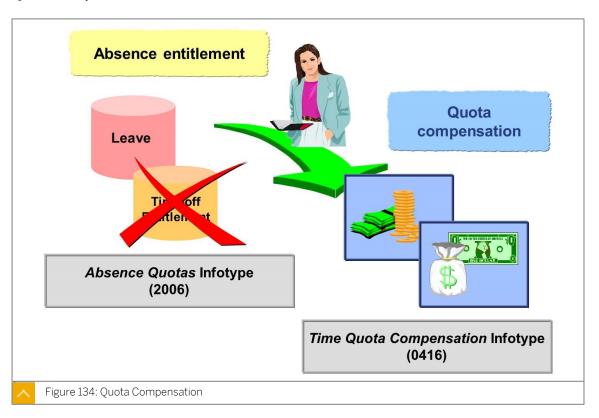
- · Standard annual leave
- Time off from overtime
- Entitlement to educational leave

### In the quota overview, you can perform the following tasks:

- Select a row containing a quota and display more detailed information.
- Correct the manually recorded quotas, that is, those that are not accrued in Time Evaluation.
- Delete manually recorded quotas.
- Branch to the list overview to display or maintain the attendances or absences to be deducted.

## **Quota Compensation**





In the Quota Compensation infotype (0416), you can remunerate employees for their remaining absence entitlements that were not used by absences.

To compensate quotas, you specify various methods in Customizing that simplify the recording of quota compensation.

### The following deduction methods are available:

- Deduction according to an absence quota deduction rule for several absence quotas
- Deduction of all absence quotas of one type that are deductible as of a key date for compensation
- Deduction of absence quotas recorded manually

In addition to determining which quotas are to be compensated, you also need to determine the amount of compensation. To do this, you have to assign an appropriately configured wage type for valuation in Payroll.

When compensation records are entered, the quota or quotas to be compensated are reduced by the specified value. The changes made to the quota remainder are indicated directly in the infotype.



#### Note:

Records of the Quota Compensation infotype are valuated directly in payroll before payroll deductions are calculated.



### **LESSON SUMMARY**

You should now be able to:

Outline the uses of the quota compensation infotype

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# Unit 7

# **Learning Assessment**

1.	Attendance and absence quota types are defined in Customizing based on the and for time quota types.
	Choose the correct answers.
	A Employee subgroup grouping
	B Validity period
	C Deduction interval
	D Personnel subarea grouping
2.	Quotas for attendances and absences are valid for a specific period.
	Determine whether this statement is true or false.
	True
	False
3.	
	Choose the correct answers.
	A If you activate this option when assigning a counting rule to an attendance/absence type, the attendance/absence type is deducted from the quotas according to the quota deduction rule stored in the counting rule.
	B The Activate Quota Deduction option specifies whether or not a quota deduction is to take place for each attendance/absence type.
	C When activated for a particular attendance/absence type, the quota deduction rule assigned to the counting rule does not apply to this attendance/absence type.

4.	Which of the following is assigned to the attendance/absence type to determine the payroll hours and days for the duration of this attendance/absence?
	Choose the correct answer.
	A Rounding rule
	B Counting rule
	C Deduction rule
	D Selection rule
5.	A rounding rule can also be assigned to a counting rule to round the payroll hours and days determined.
	Determine whether this statement is true or false.
	True
	False
6.	You can use the quota type selection rule group to control absence quota type selection based on the employee's organizational assignment.
	Determine whether this statement is true or false.
	True
	False
7.	Which of the following statements are true for the QUOMO feature?
	Choose the correct answers.
	A You specify selection rules for the quota type selection rule group to control absence quota accrual.
	<b>B</b> The quota type absence rule group is determined using the QUOMO feature.
	C You use the QUOMO feature to define the quota type selection rule group based on the employee's organizational assignment.
8.	Features are objects within the SAP system that return the following:
	Choose the correct answer.
	A Fields
	B Return values
	C Data
	D Structures

9.	For a quota, the accrual and base periods can be identical.
	Determine whether this statement is true or false.
	True False
10.	. An accrual period is the time interval that applies to calculating the absence credit.  Determine whether this statement is true or false.
	True False
11.	You can accrue absence entitlements using the RPTQTA00 report.  Determine whether this statement is true or false.
	True False
12.	In the Define Rules for Rounding Quota Entitlements activity, you define the reduction rules to determine the conditions under which a calculated entitlement is to be reduced. Determine whether this statement is true or false.
	True False
13.	. When counting the hours or days for quota entitlement, you can select whether you want to multiply the payroll hours/days first and then round off, or vice versa.  Determine whether this statement is true or false.
	True False
14.	To define generation rules, you need to define a quota type selection rule group for each selection rule.  Determine whether this statement is true or false.
	True  False

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15. Which of the following tab pages is used to define the conditions (such as employee's hiring date, only for employees in a certain challenge group, or degree to challenge) unde which the selection rule is to be used?
Choose the correct answer.
A Applicability
B Accrual period
C Base entitlement
D Total entitlement
16. Which of the following rules is used to specify how age or seniority is to be determined? Choose the correct answer.
A Conditions for using rule
B Set base entitlements
C Further processing of calculated accrual entitlement
D Further processing of calculated total entitlement
17. To accrue quota entitlements, you must specify a generation interval to determine the validity period of the absence quota record or records to be created.
Determine whether this statement is true or false.
True
False
18. Using time evaluation in standard schema TQTA, you can automatically accrue absence entitlements.
Determine whether this statement is true or false.
True
False
19. The validity interval of a quota specifies the period in which employees can use the quota Determine whether this statement is true or false.
True
False

reduce the quota.
Determine whether this statement is true or false.
True
False
21. Quota compensation reduces the remaining entitlement for a quota.  Determine whether this statement is true or false.
☐ True
False

# Unit 7

# **Learning Assessment - Answers**

1.	Attendance and absence quota types are defined in Customizing based on the and for time quota types.
	Choose the correct answers.
	X A Employee subgroup grouping
	B Validity period
	C Deduction interval
	X D Personnel subarea grouping
2.	Quotas for attendances and absences are valid for a specific period.
	Determine whether this statement is true or false.
	X True
	False
3.	Which of the following statements are true for the Activate Quota Deduction option?  Choose the correct answers.
	A If you activate this option when assigning a counting rule to an attendance/ absence type, the attendance/absence type is deducted from the quotas according to the quota deduction rule stored in the counting rule.
	X B The Activate Quota Deduction option specifies whether or not a quota deduction is to take place for each attendance/absence type.
	C When activated for a particular attendance/absence type, the quota deduction rule assigned to the counting rule does not apply to this attendance/absence type.

4.	payroll hours and days for the duration of this attendance/absence?
	Choose the correct answer.
	A Rounding rule
	X B Counting rule
	C Deduction rule
	D Selection rule
5.	A rounding rule can also be assigned to a counting rule to round the payroll hours and days determined.
	Determine whether this statement is true or false.
	X True
	False
6.	You can use the quota type selection rule group to control absence quota type selection based on the employee's organizational assignment.
	Determine whether this statement is true or false.
	X True
	False
7.	Which of the following statements are true for the QUOMO feature?
	Choose the correct answers.
	X A You specify selection rules for the quota type selection rule group to control absence quota accrual.
	B The quota type absence rule group is determined using the QUOMO feature.
	X C You use the QUOMO feature to define the quota type selection rule group based of the employee's organizational assignment.

8. Features are objects within the SAP system that return the following:
Choose the correct answer.
<ul><li> A Fields</li><li> X B Return values</li><li> C Data</li></ul>
D Structures
9. For a quota, the accrual and base periods can be identical.  Determine whether this statement is true or false.
X True
False
10. An accrual period is the time interval that applies to calculating the absence credit.
Determine whether this statement is true or false.
X True False
11. You can accrue absence entitlements using the RPTQTA00 report.
Determine whether this statement is true or false.
X True  False
12. In the Define Rules for Rounding Quota Entitlements activity, you define the reduction rules to determine the conditions under which a calculated entitlement is to be reduced Determine whether this statement is true or false. True
X False

13.	When counting the hours or days for quota entitlement, you can select whether you want to multiply the payroll hours/days first and then round off, or vice versa.
	Determine whether this statement is true or false.
	X True False
14.	To define generation rules, you need to define a quota type selection rule group for each selection rule.
	Determine whether this statement is true or false.
	X True False
15.	Which of the following tab pages is used to define the conditions (such as employee's hiring date, only for employees in a certain challenge group, or degree to challenge) under which the selection rule is to be used?
	Choose the correct answer.
	X A Applicability
	B Accrual period
	C Base entitlement
	D Total entitlement
16.	Which of the following rules is used to specify how age or seniority is to be determined?  Choose the correct answer.
	A Conditions for using rule
	X B Set base entitlements
	C Further processing of calculated accrual entitlement
	D Further processing of calculated total entitlement

17.	To accrue quota entitlements, you must specify a generation interval to determine the validity period of the absence quota record or records to be created.
	Determine whether this statement is true or false.
	X True False
18.	Using time evaluation in standard schema TQTA, you can automatically accrue absence entitlements.
	Determine whether this statement is true or false.
	X True
	False
19.	The validity interval of a quota specifies the period in which employees can use the quota Determine whether this statement is true or false.
	True
	X False
	False. The deduction interval (deduction from and to) determines the period in which the quota can be used. The deduction interval need not be the same as the validity period.
20	. Quota deduction should be activated for the relevant absence or attendance types to reduce the quota.
	Determine whether this statement is true or false.
	X True
	False
	True. Quota deduction has to be activated for, and a counting rule assigned to, each attendance or absence type that is to be deducted from a quota.
21.	Quota compensation reduces the remaining entitlement for a quota.
	Determine whether this statement is true or false.
	X True
	False
	True. The changes made to the quota remainder are indicated directly in the infotype.

# UNIT 8

# Time Manager's Workplace Functionality

# Lesson 1

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# **UNIT OBJECTIVES**

- Identify the functionality available in TMW
- Create time data IDs to display attendance and absence types in TMW
- Set up administrator profiles to control the display of TMW screens
- Create a user-specific selection list for a specific group of employees



# Unit 8 Lesson 1

# Identifying the Functionality of Time Manager's Workplace (TMW)

#### **LESSON OVERVIEW**

This lesson provides an overview of the functions of the Time Manager's Workplace (TMW).

# **Business Example**

Time recording is decentralized in your company. Time administrators such as supervisors and shop forepersons in individual departments are responsible for the management of employee time data. You want these time administrators to use the TMW to record time data. For this reason, you require the following knowledge:

An understanding of how to use TMW to record time data



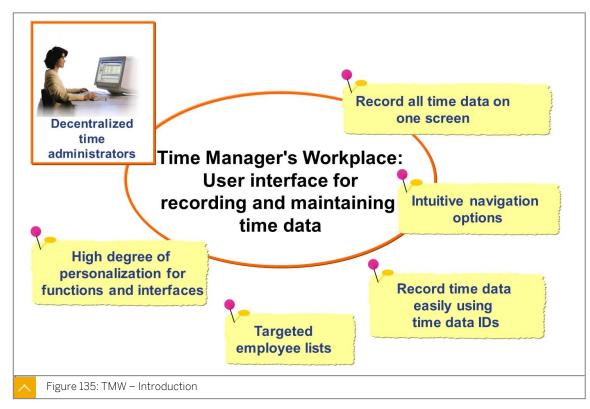
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Identify the functionality available in TMW

# **Functionality of TMW**







TMW is a user interface that optimizes the recording and maintaining of time data for decentralized time administrators.

The role of a decentralized time administrator can be fulfilled by supervisors, shop forepersons, administrative assistants, or secretaries in their own departments on site. These groups of employees maintain time data for a number of other employees, in addition to their usual tasks.

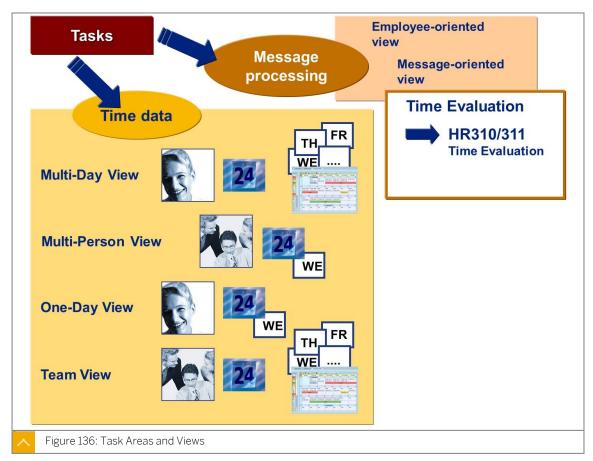
The TMW user interface is designed to be easy to learn and user-friendly.

# Some of the advantages of using TMW are as follows:

- All time data can be entered, corrected, or supplemented on one screen.
- TMW has intuitive navigation options.
- Time data is recorded using easily recognizable time data IDs.
- Time administrators can toggle between different views, such as Multi-Day, Multi-Person, One-Day, and Team views, to maintain time data.
- TMW can be personalized; you can customize TMW to suit each user's tasks with the applicable functions available.

### Task Areas and Views in TMW





TMW provides an integrated user interface to maintain time data and process time evaluation messages. The standard system includes the *Time Data Maintenance* and *Message Processing* tasks.

Using time data maintenance, your decentralized time administrators can enter, correct, or complete time data for the employees assigned to them.

The message processing function in the TMW provides time administrators with a comprehensive tool with which they can assess and process messages generated during time evaluation.

# When processing messages, time administrators can toggle between the following views:

- Message-oriented view
- Employee-oriented view

The appropriate screen layout is provided for each of these tasks. These layouts can also be used as templates for your own customized layouts. The actual screen layouts and scope of functions displayed in the TMW can be modified in Customizing according to your company-specific requirements.

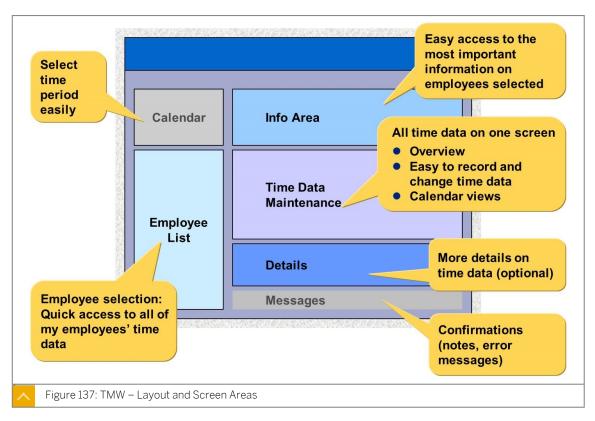


#### Note:

In this course, we will only go into detail on the scope of functions available and the Customizing steps for the *Time Data Maintenance* task (not for *Message Processing*). The *Message Processing* task is covered in the courses for Time Evaluation (HR310 and HR311).

## Layout and Screen Areas in TMW





The figure shows the layout of the screen areas for the *Time Data Maintenance* task in the TMW. The basic structure of the *Time Data Maintenance* task is similar to the *Message Processing* task, and provides users with a consistent user experience.

#### The screen areas are as follows:

#### Calendar:

The Calendar is used to select the time period for which time data is to be entered.

## **Employee List:**

The Employee List contains the employees assigned to the time administrator. Time administrators can select the employee or employees for whom they want to enter or change time data from this list.

### Info Area:

The Info Area can be used to display additional information, such as details on master data or time accounts, for any selected employee.

#### Time Data:

In the Time Data area, time administrators enter and maintain time data using intuitive time data IDs such as "ILL" for illness or "LV" for leave.

## Details:

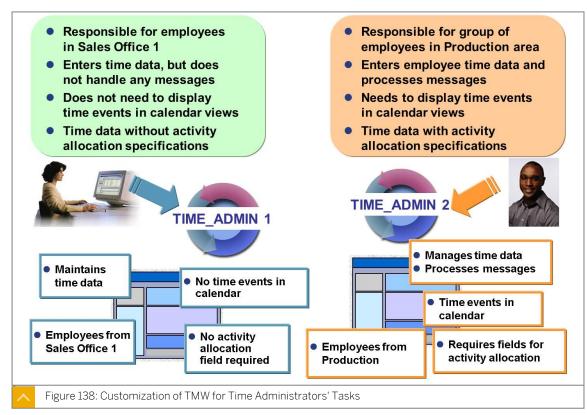
The Details area can be used to enter any additional specifications (such as activity allocation specifications for an attendance) for time data, if required. A selection of tab pages appears on the screen related to the type of time data you enter; you can further specify your time entries on these tabs.

## Messages:

The Messages area contains any messages or confirmations concerning the time data entered by time administrators. These messages can be informational, warnings, or error messages.

### Customization of TMW for Time Administrators' Tasks



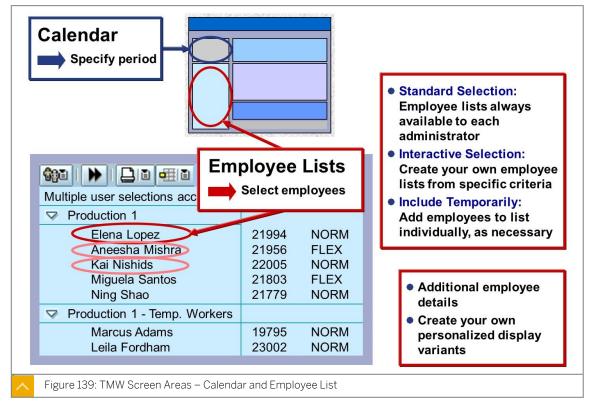


Depending on the type of information and the scope of functions you require in your company, you can modify TMW to reflect the task-specific needs of your time administrators.

This is possible using profiles. Time administrators call the TMW using a profile that contains specifications for the scope of functions and the screen layout that will appear.

# TMW Screen Areas – Calendar and Employee List





The calendar is used in the TMW to select the period for which time data is to be entered.

When you access the TMW, a period is automatically selected. You can define this default period in the profile settings when customizing the TMW.

The employee list displays the employees assigned to the time administrator according to the profile assigned to the time administrator. From the employee list, time administrators select the employees for whom they want to maintain or display data.

Depending on their profile settings, time administrators can be assigned several employee lists that they can toggle between.

# The profiles serve the following purposes:

- The profile determines whether or not, and according to which selection criteria, time administrators can create, change, or delete their own lists.
- The profile used to access the TMW also determines how the employee list is displayed on the screen.

Additional information about your employees, such as the cost center, payroll area, and work schedule rule, may be available.

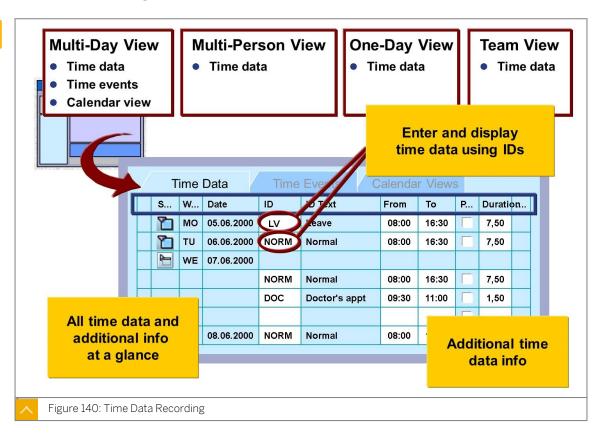
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# Time administrators can perform the following additional activities using the employee list:

- Display the employee list in a tree structure or without a hierarchy.
- Temporarily add employees for whom they are not usually responsible to the employee list.

# **Time Data Recording**





The *Time Data* area enables time administrators to maintain all the time data for their employees without having to jump to different screens.

# The following views are available for the Time Data area:

### Multi-Day view:

Allows you to maintain several days of time data for one employee

# Multi-Person view:

Allows you to maintain one day's time data for several employees at one time

# One-Day view:

Allows you to maintain time data for one specific day for one employee

#### Team view:

Time Events:

Allows you to maintain time data for several employees for a selected period

# 

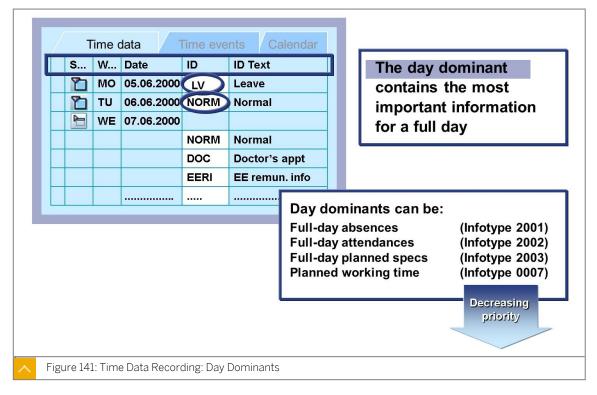
You can maintain time data stored in the Time Events infotype (2011) on the *Time Events* tab page. The *Time Events* tab page is not available in the One-Day view, Multi-Person view, or the Team view.

### Time Data:

You can maintain all other types of time data for all of the remaining time management infotypes on the *Time Data* tab page. The time data from the Time Events infotype (2011) is displayed in pairs on this tab page, however, they are only used for display purposes.

# **Time Data Recording: Day Dominants**





Time data is entered using intuitive time data IDs. This significantly reduces the administrative work load of time administrators. For example, the time administrator can enter "ILL" to create an illness record. You define the actual time data IDs that can be used for specific or general time data in Customizing, based on the business requirements of your company.

Additional fields enable you to store additional information about the time data entered. The fields that are displayed are defined in the profile that is used.

# The time data entered using time data IDs is stored in the following infotypes:

- Absences (2001)
- Attendances (2002)
- Substitutions (2003)
- Availability (2004)
- Attendance Quotas (2007)
- Employee Remuneration Info (2010)
- Time Events (2011)
- Time Transfer Specifications (2012)

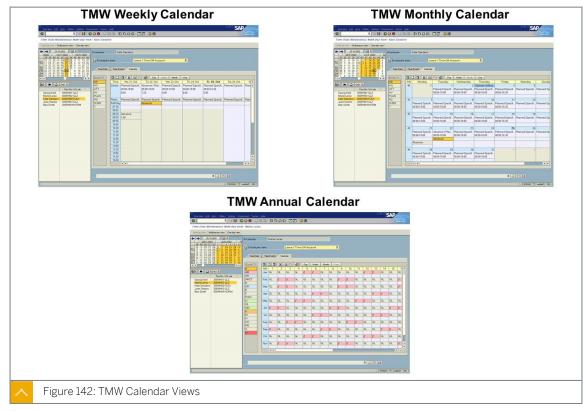
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In the *Time Data* area of the TMW, day dominants are used to represent the most important information that applies to each day. The focus is on the employee's availability. Day dominants always represent information that applies to an entire day. They are available for use in the One-Day, Multi-Day, Multi-Person, and Team views.

If you collapse the time data for a specific day, only the dominant information for that day is displayed. If you expand the day's data, all of the time data for the day in question is displayed. An additional blank line appears on the screen in which you can enter additional time data. In the Team view, you can enter data only in the time data ID line of the dominant.

### Calendar Views





## The Calendar view has the following features:

- It provides a graphical overview of a person's time data (time entries and time events).
- You can choose between a daily, weekly, monthly, and annual calendar. The calendars provide you with a quick overview of a relatively large period.
- The use of colors for time data IDs enables you to quickly differentiate different types of time data.
- You can also maintain data in this view. The color-coded time data IDs are displayed in a
  bar to the left of the calendar. You can drag and drop them to the required days. You can
  also edit these further by copying and pasting them. For example, recurring attendances
  and absences are copied to the appropriate days.

Because they work in a similar way to PC applications such as Microsoft Outlook, the calendars are very easy to use.

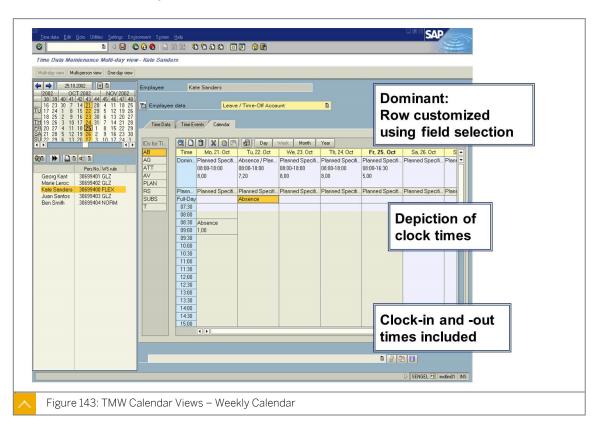


#### Note

The new calendar views are part of the standard delivery for SAP R/3 Enterprise Release 4.7. They can also be implemented in Release 4.6C on a project basis (See SAP Note 421014). SAP OSS messages can be created under the PT-RC-UI-TMW component if you require support with TMW issues.

# Calendar Views: Weekly Calendar





The weekly calendar represents a seven-day week. Users select the week they want to display or maintain in the calendar in the upper-left screen area.

The weekly calendar displays the date in the top row. The row also displays public holidays, taken from the holiday calendar assigned to the employee. The day dominant is displayed in the row below. It is defined as it is represented on the *Time Data* tab page. Then, the full-day records of the Attendances or Absences infotype are displayed. If there are no records, the planned working time is displayed.

The time data with clock times is displayed below that. They are displayed alongside the appropriate time in the calendar. The recorded clock time and the duration can also be displayed.

# Features of the Weekly Calendar

# The weekly calendar view has the following features:

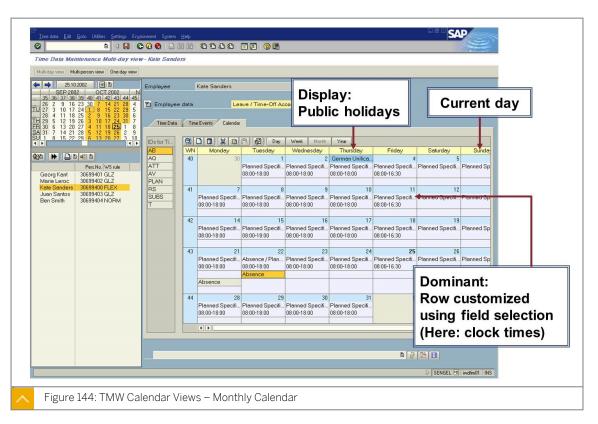
- You can display time data and time events at the same time.
- To maintain time data, administrators can simply drag and drop the color-coded time data IDs from the list to the left of the calendar.

- To enter records of more than one day, you double-click the detail area. You can also drag and drop time entries to change their position.
- If you want to maintain a time entry more than once, you can use the copy and paste function. You can also use the *Delete* pushbutton to remove incorrect time entries.
- You can customize the appearance of the calendar views to suit your requirements. In addition, all users can maintain their personal settings. For example, users can define their own color scheme for each of the four views. The Settings pushbutton is to the left of the Day pushbutton.

The TMW calendar views also include the daily calendar. It contains the same functions as the weekly calendar, but focuses on one day to aid readability.

# Calendar Views: Monthly Calendar





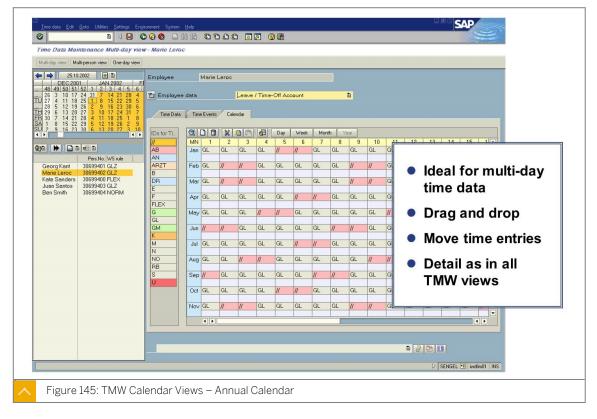
The monthly calendar provides an overview of an entire working month. As with the weekly calendar, you can select the period in the calendar to the upper left.

The calendar displays the weekdays horizontally and the calendar weeks vertically. The date is displayed in the box for the day. The current day is highlighted in bold. Public holidays are displayed here in place of the current date.

To prevent the display from becoming too cluttered, you can customize it so that the partial-day records are collapsed when they are displayed. To view further information for the day, select it by clicking it, and then switch to the weekly view or the day view.

# Calendar Views: Annual Calendar



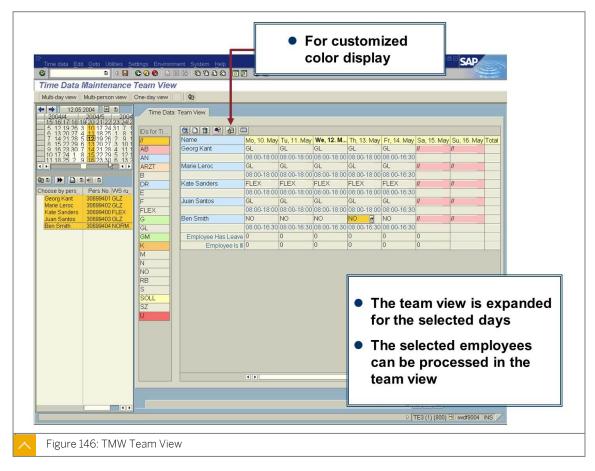


The annual calendar provides the broadest overview of your employee's working times. You can view time data for an entire year at a glance.

You can check the shift pattern of the assigned work schedule and the vacation planning, and also maintain data such as a change in leave or an illness over a longer period of time. You can use the drag and drop and copy and paste functions in this view too. You can double-click to view details for time data.

### **Team View**





The Team view is a list-oriented color display of a group of employees' time data over a period of your choice. It provides an overview of the position and frequency of full-day and partial-day data for your entire team. The Team view is ideal for entering time data when you want a quick overview of full-day time data for your team.

If partial-day data is available for employees, you can display it by double-clicking the selection icon next to the dominant. This takes you to the One-Day view for the employee, where you can select the entry and branch to the detail view. To return to the Team view, double-click the *Team View* option.

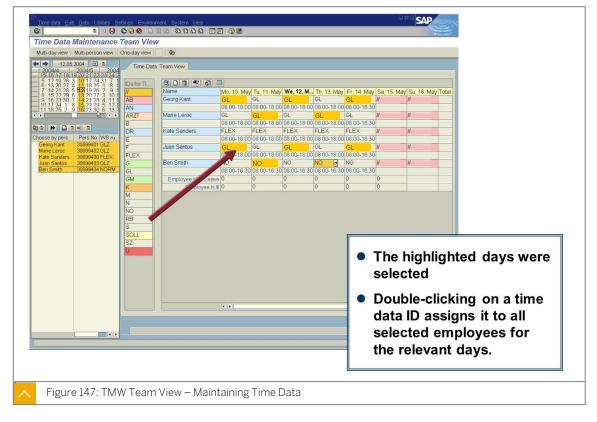
You select the period you want to edit in the calendar. You can select the employees from the employee lists. You can also add employees to the team temporarily.

If you want to plan shifts and vacation for your team, the different colors of the time data IDs enable you to recognize at a glance the position and frequency of the different shifts, and detect any bottlenecks.

The Team view provides a quick overview of full-day and multiple-day time data for your entire team. To simplify the planning process, you can use a customer-specific Business Add-In (BAdI) to define additional rows and columns for the information you require. Examples of additional information to be displayed include the number of employees off sick, or a shift counter displaying the number of early, late, or night shifts.

# Team View - Maintaining Time Data





The list-oriented Team view contains many familiar functions from PC applications, which enable you to process time data quickly and easily. You can enter time data for individual employees or an entire team.

You can customize particular colors for the time data IDs that are permitted in a profile for the Time Manager's Workplace. You can also have IDs representing similar business situations displayed in the same color or a similar color so that time administrators can analyze an employee's time data at a glance.

In addition to the color aid, the ID itself is also displayed in the field to indicate the exact nature of a time entry. The color IDs are listed in a key in a column next to the calendar view.

In the Team view, you can enter data only in the time data ID line of the dominant.

# Whole-Day Time Data Entry

# You can enter whole-day time data in the following ways:

- You can drag and drop time data IDs from the column to a field of the calendar. To do so, select the ID in the list, click it again and drag it to the required position in the Team view.
   Alternatively, you can select the required field in the Team view and double-click a time data ID; or you can simply enter the required time data by overwriting the existing time data ID.
- You can use the same functions for copying, creating, and deleting time data that you use in the other list-oriented views.



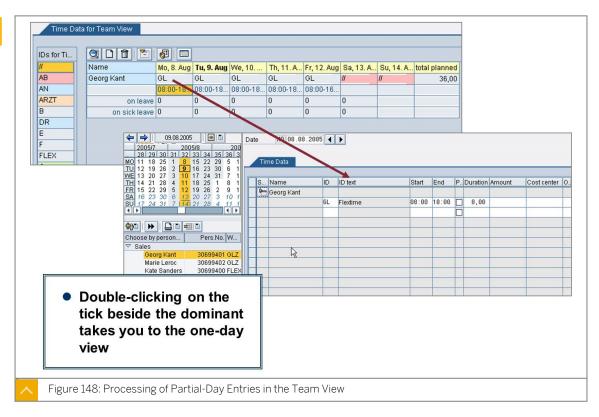


### Caution:

Cutting and pasting in the Team view is possible only for the dominant.

# **Processing of Partial-Day Entries in the Team View**



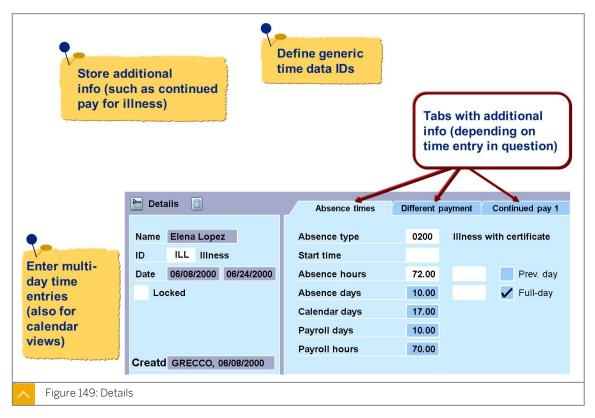


To enter partial-day information, double-click the dominant (the field to the right of the time data ID) of the required day. The One-Day view is automatically expanded. In it, you enter information, such as a doctor's appointment, to specify the time entry. You can branch from the One-Day view to the Detail view to enter additional data.

If partial-day time data exists for a day, a selection icon is displayed in the field beside the dominant. You can click the checkmark to branch to the One-Day view that displays the partial-day time data. You can then edit the data. To return to the Team view, double-click *Team View* in the menu.

### **Details**





The Details screen area can be used for various functions.

If the columns displayed in the *Time Data* screen area are not sufficient, you can display the *Details* area to further specify the time data.

You can define the specific type of time data where a generic time data ID has been used. The *Details* screen area can be used to enter multi-day time entries.

If the *Details* area is displayed for an existing time entry, the tab pages and fields used for that type of time data are displayed on the screen.

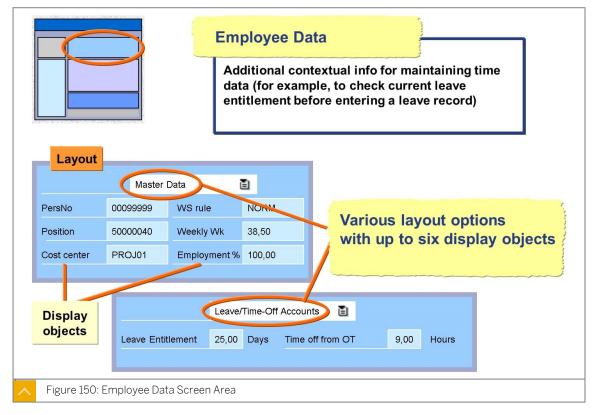
## **Generic Time Data IDs**

Only define generic time data IDs for data that is regularly used by time administrators. Time administrators can also use these generic time data IDs for other types of time data and then use the *Details* area to further specify the data.

For example, there are two different time data IDs used for the most common types of attendances in your enterprise. A generic time data ID is used for all other attendances. When one of these more seldom used attendance types must be used, time administrators simply enter a generic time data ID and then further specify the type of attendance in the *Details* area.

# **Employee Data Screen Area**





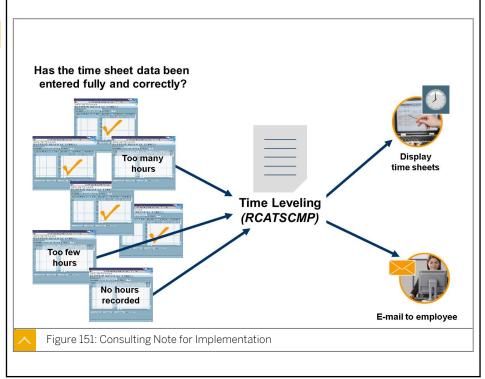
The *Employee Data* screen area displays additional contextual information about the selected employee, such as HR master data or time account balances. Time administrators can use this information to assist them when entering data.

It is useful for time administrators to be able to view their employees' time account balances when recording leave or time off from overtime, so that they know whether enough quota remains to record this data.

Objects (that is, individual information) that are displayed together can be grouped in a layout called an InfoGroup.

# **SAP Consulting Notes**





To provide you with the most up-to-date information, SAP development continuously updates the consulting note 447097: "Questions and answers on the TMW implementation."

This note also contains information for the SAP Enterprise release (SAP\_HR470) in the relevant HR Extension release (such as EA-HR 110).

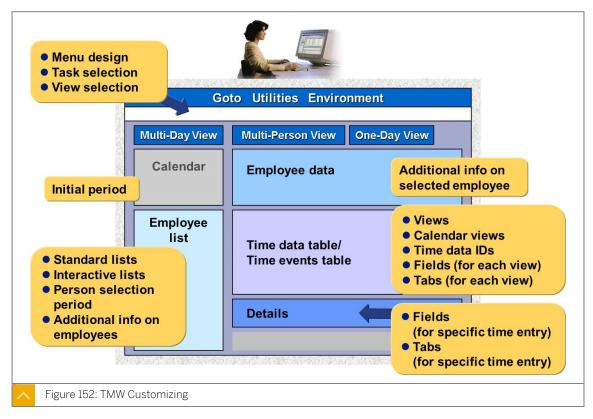
You can also display the note on the Internet. You will find a link to SAP Notes at <a href="http://service.sap.com">http://service.sap.com</a>. You can request a user for the service portal free of charge.

# The following notes are related to this topic:

- 0000407303 Employee dialog box in the Time Manager's Workplace
- 0000421014 TMW calendar views availability on 4.6C
- 0000415425 Transport of Customizing Settings
- 0000415119 Required entry fields in detail area of TMW
- 0000367249 Customer enhancements for the BLP
- 0000455468 TMW Message line in the upper screen area
- 0000598986 TMW Team View

# **TMW Customizing**





The screen layout and scope of functions in the TMW can be flexibly and individually modified to suit the specific tasks of your time administrators.



## To Customize the TMW

# 1. Create time data IDs:

- Create infotypes with subtype for frequently used shortcuts.
- Create generic time data IDs to enable other data to be entered.

## 2. Create suitable profiles:

• Copy the standard profiles and modify them to suit your requirements.

### 3. Create employee selections:

- Use the interactive employee list to create your selections.
- Assign the selections to your profiles.

# 4. Adjust screen areas as required:

• If required, you can modify the layout of the screen areas in Customizing.

# **Customizing Recommendations**

When a time administrator accesses the TMW for the first time, the system automatically queries which profile and which combination of definition set and subset for time data IDs are

to be used by the application. These specifications are mandatory. You must create the required profiles and time data IDs, and determine which tasks your time administrators have to carry out.

We recommend that you copy the profiles and, if required, time data IDs provided in the standard system.

You can enter generic time data IDs for each infotype or personal work schedule for the types of time data for which you do not want to create your own time data IDs.

If you want the employees for whom the time administrator is responsible to be displayed automatically in the TMW, you have to create suitable employee selections. You store these employee selections in each profile.

If necessary, you can modify individual screen areas of the TMW to match the requirements of your time administrators. If you do not store your own field selections in the profiles for each screen area, the field selections displayed are those contained in the standard system.



# **LESSON SUMMARY**

You should now be able to:

Identify the functionality available in TMW

# Unit 8 Lesson 2

# **Creating Time Data IDs**

### **LESSON OVERVIEW**

This lesson explains the purpose of time data IDs and shows you how to create time data IDs.

## **Business Example**

You have been asked to configure the Time Manager's Workplace (TMW) so that time administrators have access to the specific time data IDs they need to complete their time recording tasks. For this reason, you require the following knowledge:

An understanding of the purpose of time data IDs and how to set them up



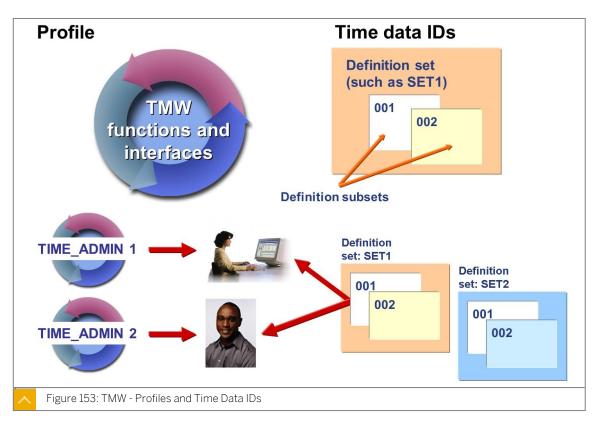
# **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Create time data IDs to display attendance and absence types in TMW

# **Time Data IDs**





You modify the appearance and certain functions of the TMW using profiles.



## Users always access the TMW using a profile, which defines the following options:

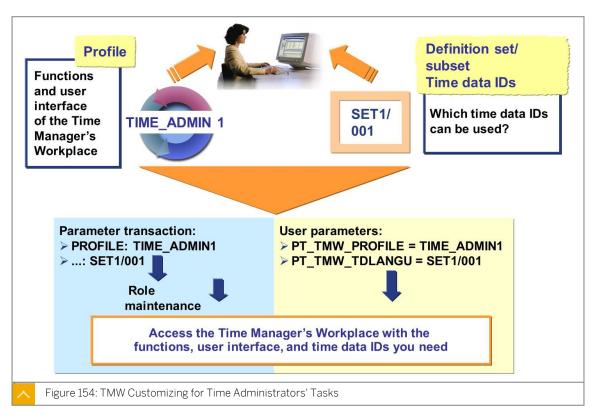
- The initial date that appears when the TMW is accessed
- The employee lists available to the time administrator
- The fields, columns, layouts, views, and functions in the individual screen areas of the TMW
- Whether the time administrator can switch between various time data ID subsets

Time data IDs can be defined individually for the types of time data in the TMW. If you want to use different time data IDs in different areas, such as departments, you can create several definition sets, which can in turn be subdivided into different subsets.

A profile and a combination of definition set/subset must be assigned to each time administrator. The combination of definition set/subset controls which time data IDs are displayed and how they can be used.

# TMW Customizing for Time Administrators' Tasks





Options are available to ensure that your time administrators automatically see the right screen with the required functions and time data IDs when they access the TMW.

The system administrator creates parameter transactions in which a profile and a combination of a definition set and subset for time data IDs are stored. You can also use these parameter transactions in role maintenance. If a role is assigned to the time administrator, the profile that is used to access the TMW and the time data IDs the time administrator can use depend on the parameter transactions assigned to that role.

You can assign the following parameters to a role:

PT\_TMW\_PROFILE:

You can use the user parameter PT\_TMW\_PROFILE to specify the profile to be used by each user to access the TMW.

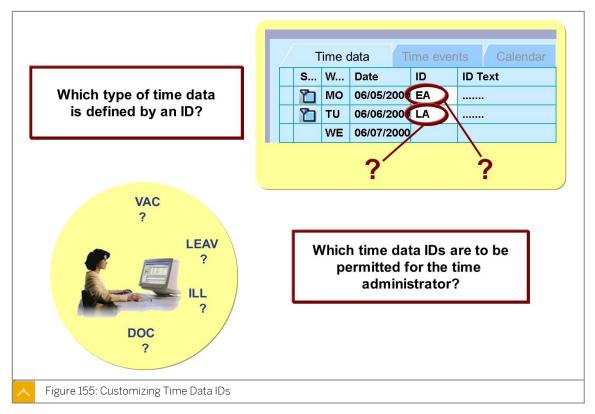
# PT\_TMW\_TDLANGU:

You can use the user parameter PT\_TMW\_TDLANGU to determine the combination of definition set and subset that the user can use.

If values for the profile and the definition set and subset are not specified either in the assigned role or in the user parameters for the user, the system queries this information when the user accesses the TMW. The user must then enter the appropriate values. The system stores these values in the user parameters and uses them each time the TMW is accessed by that user.

### **Customization of Time Data IDs**



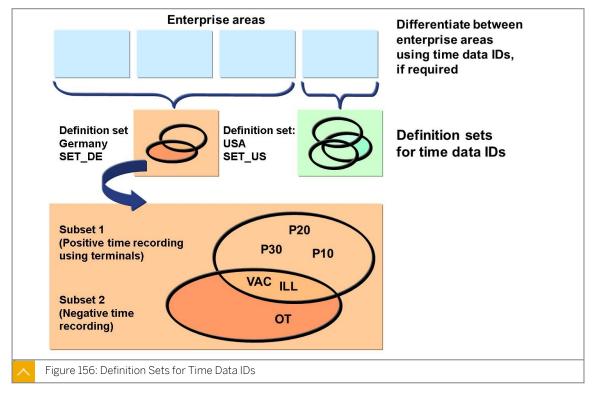


Time administrators require time data IDs to record time data.

You can define the exact type of time data that the time data ID stands for.

# **Definition Sets for Time Data IDs**





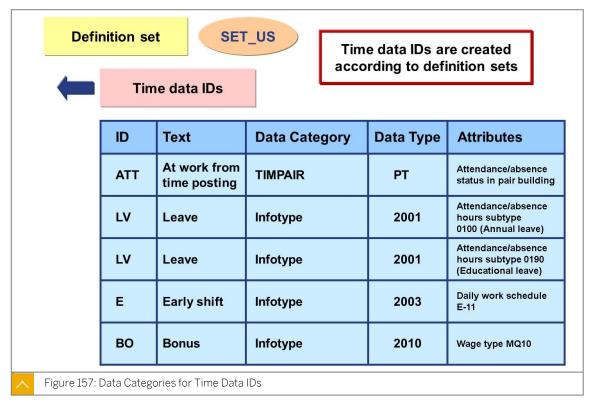
You do not need to define the same time data IDs across all areas of your company. If different areas of your company require different time data IDs, you can create definition sets for individual areas. Time data IDs can then be defined for these definition sets. Definition sets allow the time data IDs to be used independently in the different areas of your company.

For example, an international company uses the time data ID VAC for vacation, OT for overtime, and AV for availability. The German subsidiary, however, uses the time data IDs U for vacation, M for overtime, and B for availability. In this case, two definition sets are created.

Within a definition set, you can also define different subsets for time data IDs to differentiate between the time data IDs within one company.

# **Data Categories for Time Data IDs**





# Each time data ID must be assigned to one of the following data categories:

- Infotype (IT)
- Time pair (TIMPAIR)
- Work schedule data (PWS)

In the TMW, the time administrator enters the data category, a data type and additional information that uniquely identifies the type of time data.

# The following are examples of data types that are available for the Infotype data category:

- Absences (2001)
- Attendances (2002)
- Substitutions (2003)
- Availability (2004)
- Attendance Quotas (2007)
- Employee Remuneration Info (2010)
- Time Events (2011)
- Time Transfer Specifications (2012)

The data category TIMPAIR can be used only in combination with the data type Time Pair.

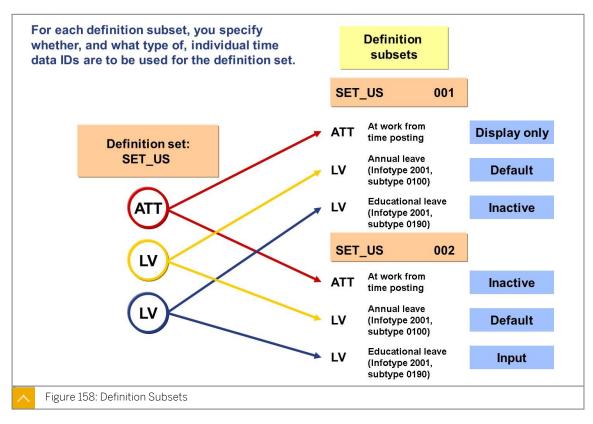
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The data category Work Schedule Data *PWS* can be used only in combination with the data type *Inactive*. The system uses this type of time data ID to display employees who are not active employees, that is, they have left the company during this selection period.

You can create generic time data IDs. The data type attributes are not required for these types of time data IDs. Generic time data IDs are used for time data that is infrequently entered or processed by time administrators.

#### **Definition Subsets**





By creating subsets, you can further differentiate how the time data IDs are used within one definition set.

# Time data IDs are created for each definition set. Definition subsets control the following time activities:

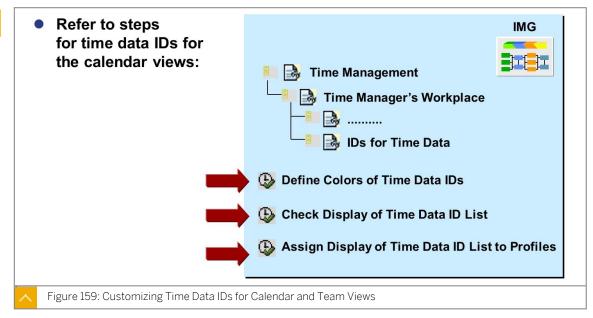
- Which time data IDs can be entered (specific ID has priority or can be changed)
- Which time data IDs are used only for display purposes (display only)
- Which time data IDs are not to be used for this subset (*Inactive*)

If employees are to enter time data IDs, you must define them as the default or an input ID. You must specify any time data ID that reflects only one characteristic as the default.

If several characteristics exist for one time data ID, you must indicate that one of these characteristics is to be the default (for each combination of groupings for personnel subarea and employee subgroup). For example, in the case for LV for annual leave (infotype 2001, subtype 0100) and educational leave (infotype 2001, subtype 0190), several characteristics can exist for one time data ID.

#### **Customization of Time Data IDs for Calendar and Team Views**





The figure displays the steps for customizing time data IDs for the calendar and team views.

The color-coded time data IDs are displayed in a bar to the left of the calendar. You can drag and drop them to the required days. You can also edit these further by copying and pasting them. For example, recurring attendances and absences are copied to the appropriate days.

# To define the colors and the appearance of the time data ID list, you perform the following Customizing activities:

- 1. In the first activity, you create the color design for the calendar view and the team view. You can define different colors for the different time data IDs. This gives users a better overview of the relevance or frequency of time data.
- 2. In the second activity, you define the layout of the time data ID list to the left of the calendar. Users can drag and drop time data IDs from the list to the calendar. The settings apply to all calendar views and time data IDs, and the team view.

You can choose between the following options:

- You can display the time data IDs for experienced users (the TDTYPE field selection).
- You can display the texts of the time data IDs for less experienced users (the *TEXT* field selection).
- You can hide the list entirely so that users can use the detail screen only to enter new time data (the *TDTYPE* field selection).
- 3. In the third activity, you assign the layout of the time data ID list to the profiles. You therefore use the profile used to access the TMW to control the layout available to the time administrator for the time data ID list.



Note:

The time data ID list is part of the TDT screen area.

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### LESSON SUMMARY

You should now be able to:

• Create time data IDs to display attendance and absence types in TMW

# Unit 8 Lesson 3

# **Setting Up TMW Administrator Profiles**

#### **LESSON OVERVIEW**

This lesson explains TMW administrator profiles and shows you how to create profiles to meet the requirements of time administrators.

#### **Business Example**

You have been asked to configure the Time Manager's Workplace so that time administrators have access to the specific functions they need to complete their time recording tasks. For this reason, you require the following knowledge:

• An understanding of how to customize TMW administrator profiles



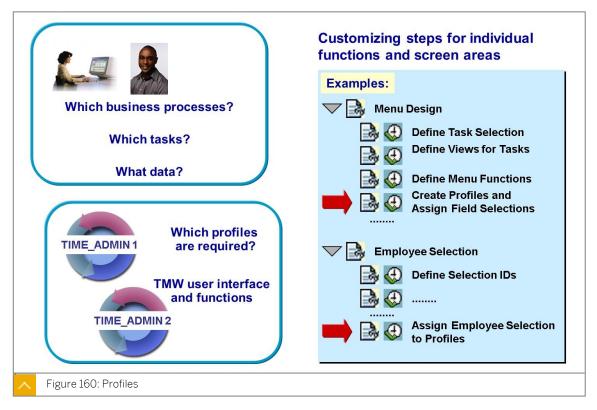
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Set up administrator profiles to control the display of TMW screens

#### Profiles for TMW





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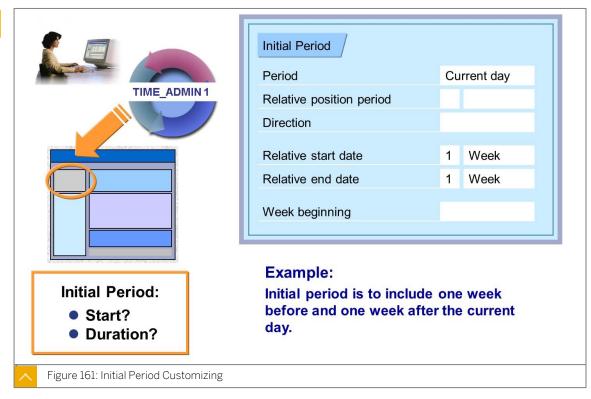
SAP delivers sample profiles in standard Customizing. You can use these profiles to maintain time data, or you can copy them and modify them to make your own company-specific profiles.

#### The sample profiles provided by SAP are as follows:

- SAP\_XX\_TIME\_ADMIN (Time Data Maintenance)
- SAP\_XX\_TIME\_AD\_GRP (Time Maintenance for Groups)
- SAP\_XX\_WORKLIST (Message Processing)

#### **Initial Period Customizing**





The initial period to be used every time the TMW is accessed is stored in the profiles.

#### The steps to set up the initial period displayed when TMW is accessed are as follows:

- Determine the initial date as the current day, week, or month.
   If the week is selected as the initial period, then you can specify which day you want to be the first day of the week.
- 2. Move the position of the initial period forward or back by a specified duration. You can enter the duration in days, weeks, or months.

You can also change the duration of the initial period. You can extend the initial period by entering a duration that has a start date in the past, or an end date in the future. You can extend the initial period by weeks or months. If, for example, you choose a week, the system increases the initial period up to the first day of the week or the weekend. If the initial date is the first day of the week or weekend, then the system extends the initial period by another week into the past or future. In other words, the initial period can be extended by up to one week in each direction. The same applies if you enter one month.



#### LESSON SUMMARY

You should now be able to:

• Set up administrator profiles to control the display of TMW screens



## **Creating Employee Selections in TMW**

#### **LESSON OVERVIEW**

This lesson shows you how to customize the employee list displayed in TMW using different selection criteria.

#### **Business Example**

Each time administrator is responsible for the time entry for a specific group of employees. You need to configure the TMW so that the time administrators have access to these employees. For this reason, you require the following knowledge:

 An understanding of the customization of user-specific settings for employee selection lists



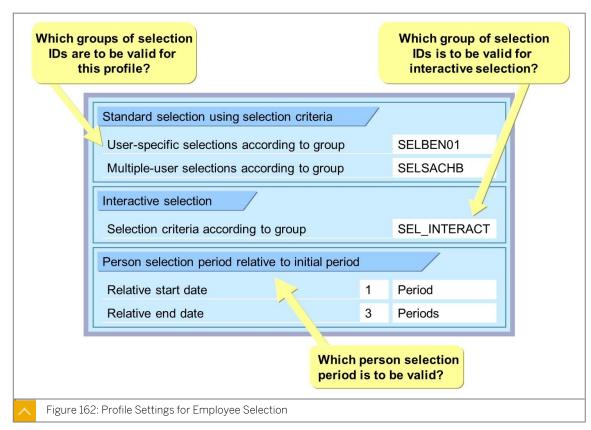
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

• Create a user-specific selection list for a specific group of employees

#### **Employee Selection in TMW**







In the profile, you specify which employee selections are valid when the TMW is accessed using this profile.

In a standard employee selection, you can specify either a user-dependent group or a group available for all users. If you want your time administrators to be able to create their own employee selections, you must set up a corresponding group for interactive selection.

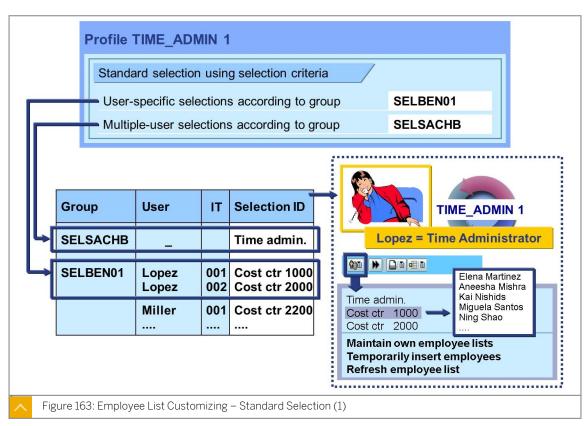
The entries for the person selection period are required to determine whether or not, and up to what point of time in the past, the system displays employees who are no longer assigned to the time administrator or who have left the company.

The person selection period also determines whether or not, and up to what point in time in the future, the system displays employees who are to be hired at a future date or will be assigned to that time administrator in the future.

The person selection period is calculated on the basis of the respective initial period. If you do not specify an entry in the *Person Selection Period Relative to Initial Period* screen area, the system selects the employee list for the period that you defined as the initial period. If you specify an entry in the *Person Selection Period Relative to Initial Period* screen area, the person selection period is extended backwards from the start date of the initial period into the past, or from the end date of the initial period to a future date.

#### **Employee List Customizing - Standard Selection (1)**





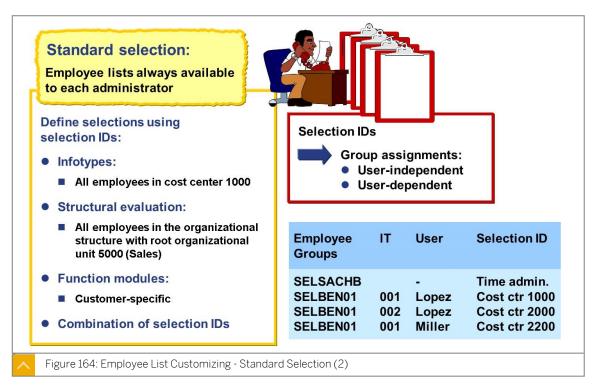
The standard selection is used to determine the employee selections available to time administrators in the *Employee List* screen area. The individual employee selections are defined using selection IDs.

In the standard selection, several employee lists (selection IDs) can be made available to the time administrators. You do this by grouping the selection IDs.

In a grouping, you can indicate whether an individual selection ID is user-specific or is available to all users. User-specific selection IDs are only valid for the user entered; user-independent selection IDs are valid for all users.

#### **Employee List Customizing - Standard Selection (2)**





Selection IDs are also used in various areas of HR to simplify the grouping together of objects for selection purposes. Selection IDs can be defined based on infotype tables, structure reports, or special function modules. These three types of selection IDs can be combined in any way you require.

#### To define a selection ID based on a table, you can use the following types of fields:

- Infotype fields
- Additional fields
- · Text fields
- Fields specific to SAP Query (additional fields, additional table fields, and alias table fields).

You can also define ranges that restrict the number of objects to be processed for selection IDs based on tables.

Selection IDs based on a structure correspond to a structural evaluation. A start object and an evaluation path are used to determine the personnel numbers.

Selection IDs based on a function use a function module to collect the data.



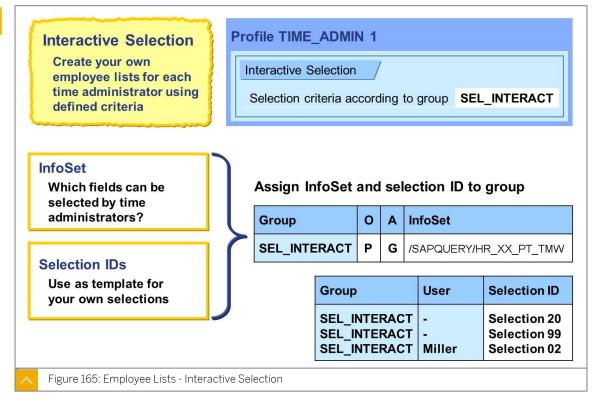
#### Note

The selection based on the time administrator's ID is included in the standard system.

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#### **Employee Lists - Interactive Selection**





Using the interactive employee selection function, time administrators can create their own employee lists according to specified criteria.

To do so, they must have a group for interactive selection in the profile that they use to access the TMW.

An infoset and optional selection IDs can be stored in a group for interactive selection. Time administrators can create their own employee selection using the criteria of the infoset and any specified selection IDs (templates).

An infoset provides time administrators with additional selection criteria (fields) to create their own employee selection. If time administrators want additional employee lists (selection IDs) as templates for their own selections, then the corresponding selection IDs must be stored in the group for interactive selection. The standard system contains the group TMW\_INTERACTIVE with the infoset /SAPQUERY/HR\_XX\_PT\_TMW.



#### **LESSON SUMMARY**

You should now be able to:

Create a user-specific selection list for a specific group of employees

# Unit 8

# **Learning Assessment**

1.	If the columns displayed in the Time Data screen area are not sufficient, you can display thearea to further specify the time data.
	Choose the correct answer.
	A Info
	B Details
	C Messages
	D Other
2.	Which of the following views allows you to maintain time data for several employees for a selected period?
	Choose the correct answer.
	A Multi-person view
	B Multi-day view
	C Team view
	D Group view
3.	Which one of the following statements is true?
	Choose the correct answer.
	A Time administrators can be assigned several employee lists that they can toggle between.
	<b>B</b> Time administrators can be assigned only one employee list.
	C Time administrators can be assigned several employee lists but they can use only one employee list at a given time.
	D It is not possible to allow time administrators to create their own lists.

4.	In which of the following views is the Time Events tab available?
	Choose the correct answer.
	A One-day view
	B Multi-person view
	C Multi-day view
	D Team view
5.	The Time data IDs are connected to the Infotype and Subtype of Attendances, Absences and so on.
	Determine whether this statement is true or false.
	True
	False
6.	Within a definition set, you can also define different subsets for time data IDs to differentiate between the time data IDs within one enterprise.
	Determine whether this statement is true or false.
	True
	False
7.	Which of the following data categories can a time ID be assigned to?
	Choose the correct answers.
	A Leave schedule rule
	B Infotype
	C Work schedule rule
	D Attendances and Absences
8.	You cannot use the sample profile in standard Customizing to maintain data.
	Determine whether this statement is true or false.
	True
	False

9.	You can move the person selection period forward and backward based on your requirements.
	Determine whether this statement is true or false.
	True
	False
10	. Which of the following selection fields is used to define the table section type?
	Choose the correct answer.
	A Start object field
	B Evaluation path field
	C Text field
	D Function module field

# **Learning Assessment - Answers**

1.	If the columns displayed in the Time Data screen area are not sufficient, you can display thearea to further specify the time data.
	Choose the correct answer.
	A Info  X B Details
	☐ C Messages
	D Other
2.	Which of the following views allows you to maintain time data for several employees for a selected period?
	Choose the correct answer.
	A Multi-person view
	B Multi-day view
	X C Team view
	D Group view
3.	Which one of the following statements is true?
	Choose the correct answer.
	X A Time administrators can be assigned several employee lists that they can toggle between.
	B Time administrators can be assigned only one employee list.
	C Time administrators can be assigned several employee lists but they can use only one employee list at a given time.
	D It is not possible to allow time administrators to create their own lists.

4.	In which of the following views is the Time Events tab available?  Choose the correct answer.
	A One-day view
	B Multi-person view
	X C Multi-day view
	D Team view
5.	and so on.
	Determine whether this statement is true or false.
	X True
	False
6.	Within a definition set, you can also define different subsets for time data IDs to differentiate between the time data IDs within one enterprise.
	Determine whether this statement is true or false.
	X True
	False
7.	Which of the following data categories can a time ID be assigned to?
	Choose the correct answers.
	A Leave schedule rule
	X B Infotype
	X C Work schedule rule
	D Attendances and Absences
8.	You cannot use the sample profile in standard Customizing to maintain data.  Determine whether this statement is true or false.
	True
	X False

9.	You can move the person selection period forward and backward based on your requirements.		
	Determine whether this statement is true or false.		
	X True		
	False		
10. Which of the following selection fields is used to define the table section type?			
	Choose the correct answer.		
	A Start object field		
	B Evaluation path field		
	X C Text field		
	D Function module field		

# UNIT 9 Cross-Aplication Time Sheets (CATS)

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#### **UNIT OBJECTIVES**

- Outline the process flow of CATS
- Hire an employee who will use CATS to record time
- Set up a CATS data entry profile
- Record time data for an employee
- Configure the approval procedure



# Unit 9 Lesson 1

## **Outlining the Process Flow of CATS**

#### **LESSON OVERVIEW**

This lesson explains the processes involved in using Cross-Application Timesheets.

#### **Business Example**

Your company is planning to implement the use of Cross-Application Timesheets (CATS). As a member of the implementation team, you are responsible for the set up of the processes involved in using CATS. To accomplish this task, you require the following knowledge:

An understanding of the process flow involved in using Cross-Application Timesheets



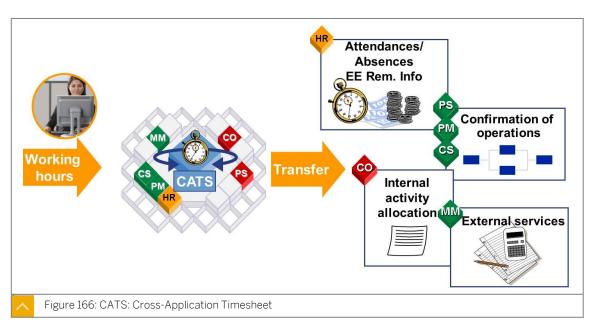
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

· Outline the process flow of CATS

#### **CATS Overview**





The Cross-Application Timesheet is a cross-application tool used to record working times and other data in a central worksheet.

You can use data entry profiles to format the layout of the Timesheet to suit your needs.

Working times may be relevant to more than one target component simultaneously. Reports transfer the released and/or approved data to one or more target components.

You can use the Cross-Application Timesheet to record times for, and transfer them to, the following target components:



- Controlling (CO): Internal activity allocation, statistical key figures
- Human Capital Management (HCM): Attendances, absences, and employee remuneration information
- External Services (MM-SRV): Entry of services performed for external services
- Plant Maintenance (PM), Customer Service (CS), and Project System (PS): Confirmations for orders or networks



#### Hint:

Confirmations to *Production Planning* (PP) are not supported in the Cross-Application Timesheet.

A number of user interfaces are available for the Cross-Application Timesheet and include independent and enhancing user interfaces.

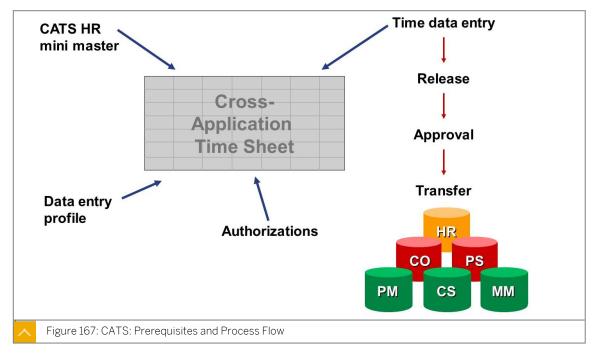
- The independent user interfaces include the following:
  - CATS classic
  - CATS regular (Internet Application Component, ESS application in a Web browser)
  - CATS for service providers
  - CATS notebook (mobile offline solution for laptops, based on Mobile Engine technology)
  - CATS time entry through Duet Time Management
- The enhancing user interfaces include the following:
  - CATS instant (iView in the SAP Enterprise Portal)
  - CATS phone (mobile online solution for WAP enabled cellular phones)

The enhancing user interfaces enable your employees to record data quickly wherever they are.

If you want to display or change data that you entered using an enhancing user interface, you can use one of the independent user interfaces.

**CATS: Prerequisites and Process Flow** 





To be able to use the Cross-Application Timesheet, you must have:

- A HCM mini master (personnel number and personal data for the employees whose times are recorded)
- A data entry profile for recording employee time data
- The necessary authorizations for working with the Cross-Application Timesheet

The following processes are available to set up time in a CATS Timesheet:

- 1. Entering data in the timesheet
- 2. Releasing the time data
- 3. Approving the time data
- **4.** Transferring the time data to the target components



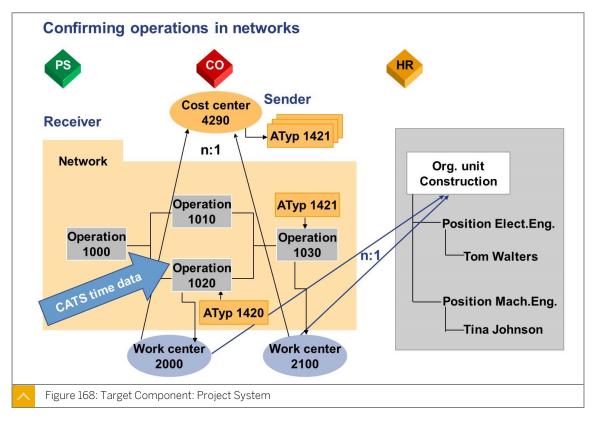
#### Note:

You can carry out these steps individually, or skip some of them. For example, time data can be released or approved automatically once you have entered it.

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#### **Target Component: Project System**





You can use the timesheet to carry out confirmations for networks. When generating confirmations for networks, the system also triggers an activity allocation in *Controlling*.

A network is an instruction for carrying out tasks within a project in a particular way and in a defined time. Networks are used as a basis for planning, analyzing, describing, controlling, and monitoring deadlines, costs and resources (personnel, machines, production resources/tools, materials).

A network contains operations for the individual activities within a project. For each operation, the expected duration, work and type of activity is planned in days and hours. The actual hours worked are confirmed to the operations of a network.

An operation is assigned to a work center, which represents an organizational unit. Operations can be assigned to different work centers within one network.

Several work centers can be assigned to the same cost center. Activity types are planned for cost centers. The activity types represent the activity performed within the cost centers. They are assigned to operations in networks, for example.



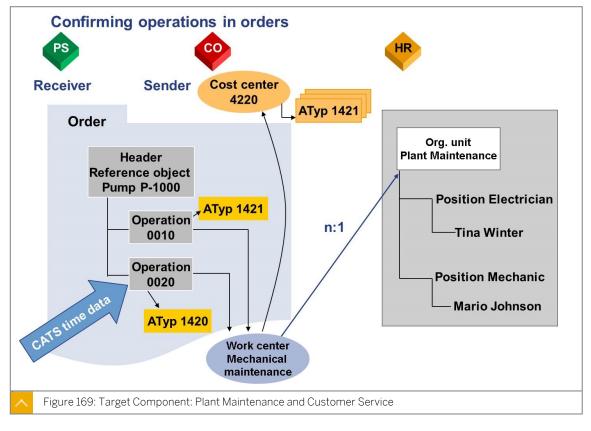
#### Note:

Activity types can also be assigned to the work center.

Work centers can be assigned to an organizational unit from Human Resources. Positions are assigned to an organizational unit and are occupied by persons who normally perform the work.

#### Target Component: Plant Maintenance and Customer Service





You can use the Cross-Application Timesheet to carry out confirmations for *Plant Maintenance / Customer Service maintenance* or service orders. When generating confirmations, the system triggers an activity allocation in *Controlling*.

A *Plant Maintenance* order plans the execution of maintenance tasks, tracks the progress of the work, and allocates the costs for the maintenance task.

Operations are used to describe the individual activities that are required for an order. For each operation, the expected duration, work, and type of activity is planned in days and hours. The actual hours worked are confirmed to the operations of an order.

An operation is assigned to a work center. Operations can be assigned to different work centers within one order.

The work center is assigned to a cost center and several work centers can be assigned to the same cost center. Activity types are planned for cost centers. The activity types represent the activity performed within the cost centers. They are assigned to operations in orders, for example.



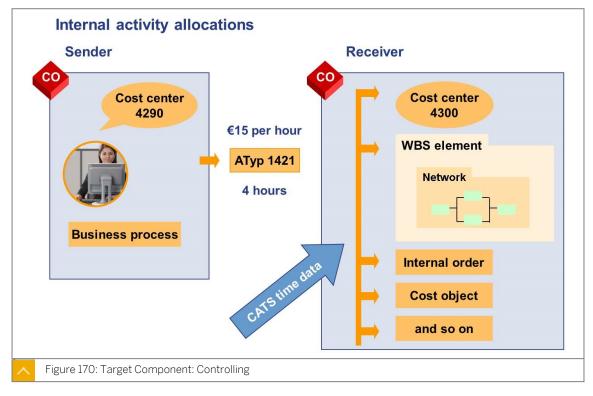
Note:

Activity types can also be assigned to the work center.

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#### **Target Component: Controlling**





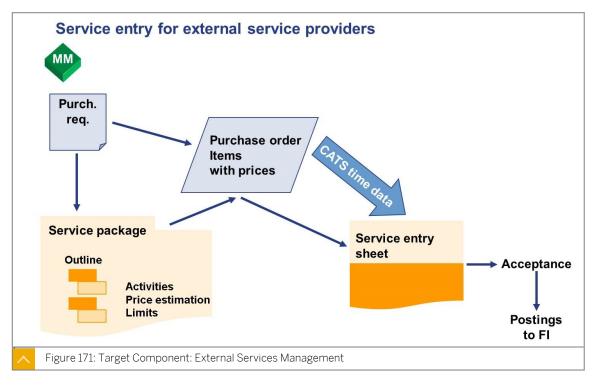
You can use the Cross-Application Timesheet to carry out internal activity allocations within Controlling. This process allocates, for example, the activities performed between a sender cost center and a receiver cost center. The hours are valuated in Controlling using an activity type. The sender cost center is credited and the receiver cost center is debited.

The timesheet can also be used to carry out internal activity allocations to a *Work Breakdown Structure* (WBS) element. The *WBS* element is an individual cost object. You can assign a network or an order to it. Aggregate costs can be posted as an internal activity allocation from a sender cost center to the *WBS* element.

You can also use the timesheet to record *statistical key figures*. These figures are transferred to Controlling, where they can be used for internal activity allocations and for analyses.

#### **Target Component: External Services Management**





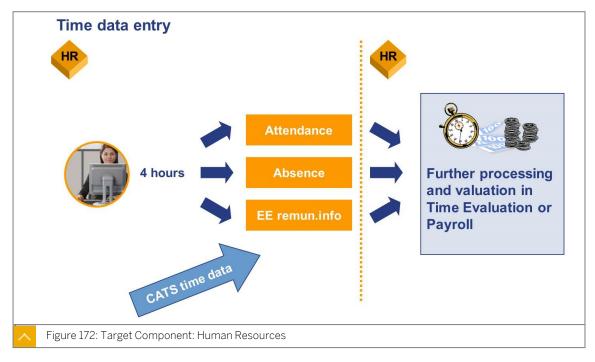
You can use the Cross-Application Timesheet to transfer data to the service entry sheet in Materials Management.

A purchase requisition (from *Plant Maintenance*, for example) is used to prepare a purchase order. A service package with links to services, price estimates, value limits, and so on, is used.

Data for each item in a purchase order is recorded using a service number. This data appears in the *Materials Management* service entry sheet. The service entered in the Cross-Application Timesheet is accepted in further order processing. The goods receipt of the service is posted in *Materials Management* (with corresponding postings in *Financial Accounting*).

#### **Target Component: Human Resources**





You can use the Cross-Application Timesheet to record and transfer time data such as attendances, selected absences, and employee remuneration information for Human Resources.

The time data is then stored in the corresponding time management infotypes, where it can be accessed by *Time Management* and *Payroll*.

The Substitutions infotype (IT2003) cannot be supplied with timesheet data.

#### **Facilitated Discussion**



#### **LESSON SUMMARY**

You should now be able to:

• Outline the process flow of CATS

# Unit 9 Lesson 2

## **Outlining the CATS Mini Master Data Record**

#### **LESSON OVERVIEW**

This lesson explains the purpose of the Cross-Application Timesheet (CATS) mini master data record and the information required to complete the setup of a mini master data record.

#### **Business Example**

Your company has decided to implement the Cross-Application Timesheet for all employees. One of the requirements for an employee to use CATS is the set up of a CATS mini master data record. As the time administrator, you are responsible for the set up the CATS mini master for all employees. To accomplish your task, you require the following knowledge:

• An understanding of the infotypes required to set up a CATS mini master data record.



#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Hire an employee who will use CATS to record time

#### Mini Master Overview





You record person related time data in the Cross-Application Timesheet. Each employee must have a mini master. In it, each employee is identified by a unique personnel number. The mini master is stored in the *Human Capital Management* (HCM) infotypes. Infotypes are classified logically according to content, and contain both optional and required fields. They



are used for the Cross-Application Timesheet even if *Human Capital Management* is not implemented.

The following HCM infotypes are a minimum requirement for the CATS mini master:

#### Actions (IT0000):

This infotype is used to enter initial data when an employee is hired.

#### • Organizational Assignment (IT0001):

This infotype contains information on the employee's position within the company's enterprise and personnel structures.

#### Personal Data (IT0002):

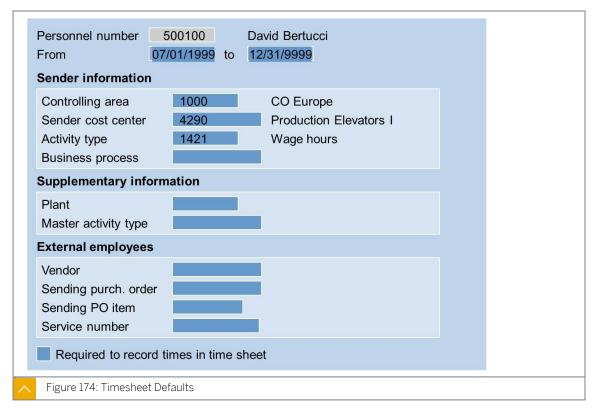
This infotype contains employee data such as first and last name, date of birth, and so on.

#### Planned Working Time (IT0007):

This infotype contains an employee's *work schedule*, outlining workdays and hours, including breaks. The daily hours can be used as default values in the Cross-Application Timesheet.

#### **Timesheet Defaults**





Default values for the timesheet are stored in the *Timesheet Defaults (ITO315)*. These values are proposed in the timesheet to assist users as the enter data:

You can make the following entries in the *Timesheet Defaults* infotype:

- Account assignments, such as the sender cost center or the activity type, are used in Logistics and Controlling.
- The plant is used as a default value for Logistics.

- Vendor, sending purchase order, sending purchase order item, and service number are used as default values for the *External Services Management* component (MM-SRV).
- The *Required to record times in Time Sheet* checkbox determines that the employee currently being processed is required to record times in the timesheet.

If you select this field, you can use the report *RCATSCMP: Timesheet: Time Leveling* to select employees who are required to record their times in the timesheet.

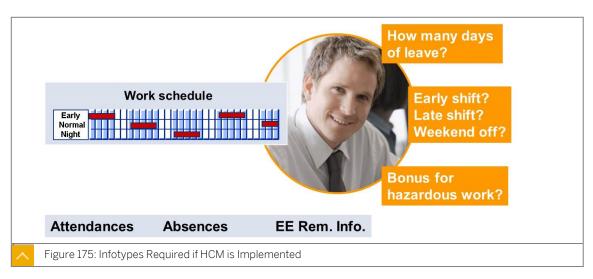


#### Note:

While the use of the *Timesheet Defaults* infotype is optional, it is strongly advised that you use is as it considerably reduces the work involved in entering timesheet data.

#### Infotypes Required if HCM is Implemented





The following are examples of infotypes used if the Human Capital Management component is implemented:

#### Planned Working Time (IT0007):

This infotype contains an employee's work schedule with the exact description of his or her workdays, working hours, and breaks.

#### Absence Quotas (IT2006):

An employee's leave entitlement is stored in this infotype.



#### Note:

If you still use the Leave Entitlement (IT0005), you are advised to convert to infotype 2006.

#### · Absences (IT2001):

Absences are used if an employee is off work for a full day or for some hours, for example, if an employee is sick or on leave.

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#### • Attendance Quotas (IT2007):

Attendance quotas are used to grant employees overtime approvals for particular periods (days, hours, specific times).

#### Attendances (IT2002):

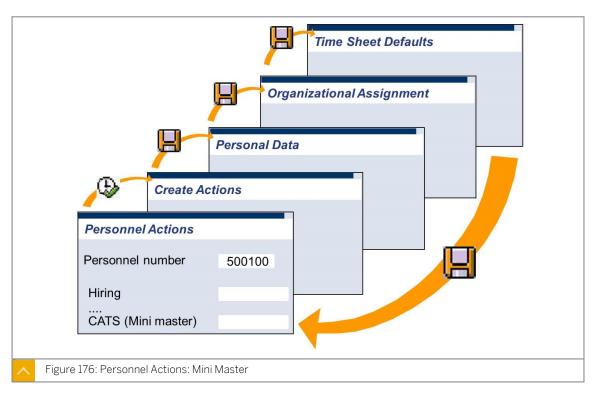
Attendances are used to determine an employee's working hours on a certain day or over a particular period of time.

#### • Employee Remuneration Information (IT2010)

In this infotype, you can manually enter calculated wage amounts, bonuses, or other unplanned wage types. These values are transferred to payroll.

#### Personnel Actions: Mini Master





A HCM mini master is required for all employees for whom you enter time data using CATS.

If you use the Human Capital Management component, it provides the employee data.

If you do not use *Human Capital Management*, you can use the personnel action *CATS Mini Master* to enter initial employee data and create all required infotypes. Using this action, the system leads you through the required screens.

Personnel actions can be accessed using transaction code PA40 or by choosing the following from the SAP Easy Access screen: Human Resources > Personnel Management > Administration > HR Master Data > Personnel Actions.

If you want to carry out the personnel action to create the mini master, select the action, choose *Execute*, fill out the required fields in the various infotypes, and save your entries after each infotype.



#### LESSON SUMMARY

You should now be able to:

• Hire an employee who will use CATS to record time

# Unit 9 Lesson 3

## **Setting Up CATS Data Entry Profiles**

#### **LESSON OVERVIEW**

This lesson outlines the purpose of CATS data entry profiles which must be assigned to employees to enable data entry in the Cross-Application Timesheet.

#### **Business Example**

Your company is planning to implement the use of the Cross-Application Timesheet for all employees. As the Time Administrator, you are responsible for the set up and maintenance of CATS data entry profiles. You must set up the profiles and assign them to employees. You require the following knowledge:

- An understanding of the elements of the CATS data entry profile
- How to set up a CATS data entry profile



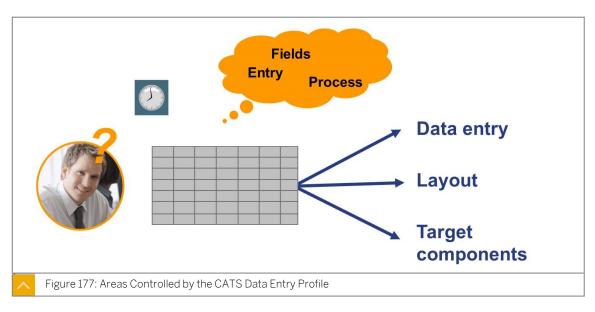
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Set up a CATS data entry profile

#### **CATS Data Entry Profiles**





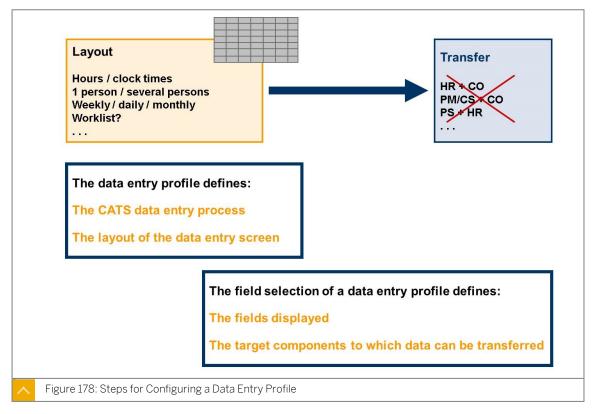
To be able to enter time data in the Cross-Application Timesheet, you must have a data entry profile. You can define different data entry profiles according to your requirements in *Customizing* for Cross-Application Components.

The purpose of the data entry profile is as follows:

- It determines the data entry process for the time data that is entered using the profile.
- It determines the layout of the data entry screen when the profile is used to access the Cross-Application Timesheet.
- It controls the target components to which the time data recorded using the profile can be transferred.

#### Steps for Configuring a Data Entry Profile



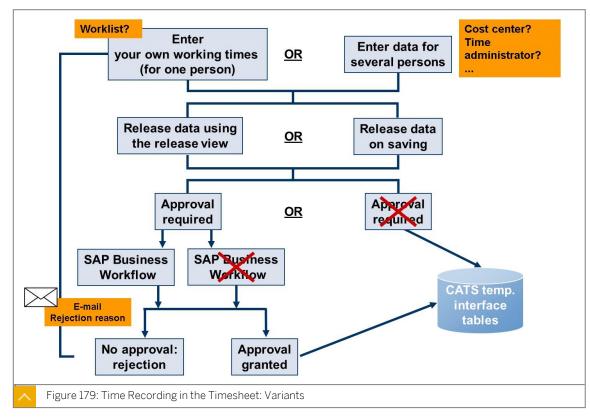


The settings for the time recording process and the data entry screen are made in the data entry profile. The following steps must be completed:

- Customizing the data entry profile: Options for controlling the data entry process include the timesheet layout, and the transfer to the target components. You can, for example, define how data is entered (on a daily, weekly or monthly basis, recording times as a number of hours or as clock times), the default values you want to use in the timesheet, and whether particular times are highlighted.
- *Field Selection:* You make the settings for controlling the transfer to the target components in the field selection. For example, you can select the fields that can be filled in the timesheet. The transfer to the target components takes place according to the fields that are filled.

#### Time Recording in the Timesheet: Variants





You use the Cross-Application Timesheet to enter data for one person or for several persons at the same time. The CATS data entry process generally consists of four steps. You may be able to skip some steps and you can use a workflow for the approval process.

In each data entry profile, you specify the following information:

- · Record times for individual employees or centrally for several employees.
- Release the time data on saving or using a separate step.
- Approve time data in a separate step or whether no approval is required.
- Transfer the data directly to Time Management in HR when you save it
- Implement a workflow process for the approval step.



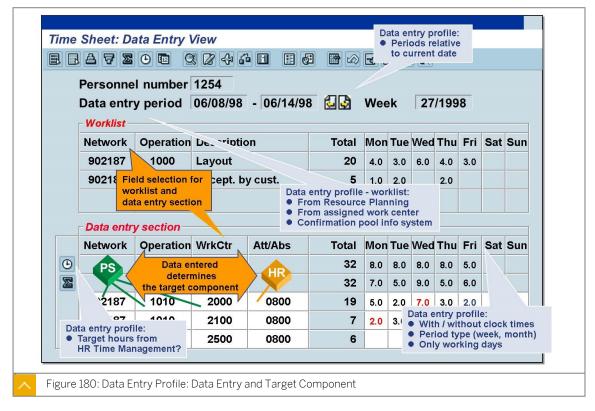
#### Note:

This means that the data entry process can vary greatly from one data entry profile to another.

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#### Data Entry Profile: Data Entry and Target Component





The layout of the screen and the data entry in the timesheet is controlled using the data entry profile and the field selection.

When you customize the data entry profile, you specify the following information:

- The required steps in the CATS process, such as whether an approval step is necessary before the data is transferred to the target component
- The period type (week, day, month), entry in hours or clock times, scrolling to additional periods
- Whether weekdays or calendar days are displayed
- Whether the daily hours from the employee's work schedule are displayed
- Whether you use a worklist for Logistics

In field selection, you select fields for the data entry section, the worklist, and the settings. Data transfer to one or more target components is possible, depending on the fields in the data entry section.



#### Note:

Not all transfer combinations make sense, since they may lead to duplicate postings in Controlling. If this is the case, the system recognizes the problem and reacts accordingly.

#### **Data Entry Profile: General Settings**



General settings				
✓ Profile changeable	Highlight rej. recs	✓ Release future times		
✓ With target hours	Highlight addnl info	✓ Release on saving		
✓ With totals line	☐ Workdays only	☐ No changes after approval		
☐ With clock times	Display weekdays			
☐ No Deductn of Breaks	☐ No initial screen			
Cell length		Trip schema		
Authorization				
Print program				
Figure 181: Data Entry	Profile: General Settings			

General settings control the entry of data and the CATS process and include the following:

**Profile changeable:** The end user can change various settings for the data entry screen while it is in use.

**With target hours:** Target hours are displayed in the upper section of the timesheet. You determine how you want the target hours to be determined in the *Time settings* section.

With totals line: A line with the day total is displayed.

With clock times, No deduction of breaks: If users enter clock times (start and end of work) instead of hours, unpaid breaks (according to the work schedule in Time Management) are not deducted when the number of hours worked is calculated.

Workdays only: Only workdays from the factory calendar are displayed.

Display weekdays: The days of the week are displayed instead of dates.

**No initial screen:** The data entry profile and personnel number are not entered. This is relevant only if the employee records his or her own working times. The CVR and PER user parameters are relevant for the employee. Instead of using the PER user parameter to assign the user, you can use the *Communication* infotype (IT0105), subtype 0001.

Release future times: Data for future periods can be released.

Release future times: Data is released immediately when it is saved.

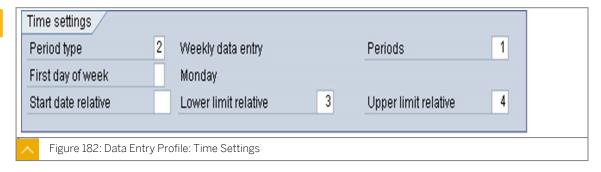
No changes after approval: Approved data can no longer be changed.

**Print Program:** SAP only provides a sample printing program *RCATSP01*. You can create your own print program and enter it in this field.

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#### **Data Entry Profile: Time Settings**





Time settings determine the period for which time data is recorded and include the following options:

*Period type:* Defines whether the data is recorded on a daily, weekly, or monthly basis.

Periods: Specifies how many periods are displayed at the same time for data entry.

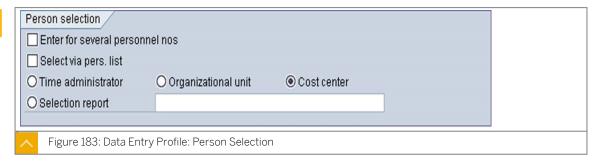
First day of week: The start of the week.

*Key date relative:* The key date relative to the current date for the timesheet is specified in this field. The system enters the date automatically, but it can be overwritten.

**Lower/upper limit relative:** Specifies how far forward or backward the user can scroll when changing the data entry period in the timesheet. The system takes account of the number of periods in the *Periods* field.

#### **Data Entry Profile: Person Selection**





**Enter for several personnel numbers:** You can enter data for several people at the same time. (Choosing Settings allows you to select persons according to various criteria described below.)

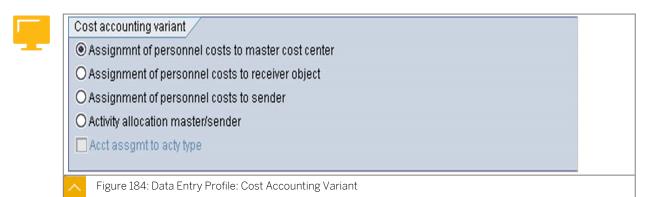
**Select via. pers. list:** The system displays a list of personnel numbers for you to select from. You must always use the list option when entering data for several personnel numbers.

Alternatives for generating the list of personnel numbers include the following:

- *Time administrator:* The system selects the personnel numbers that are assigned to the relevant administrator indicated on the *Organizational Assignment* infotype (IT0001).
- *Organizational unit:* The system selects the personnel numbers that are assigned to the specified organizational unit.
- Cost center: The system selects the personnel numbers that are assigned to the specified cost center.

• Selection report: To select the personnel numbers, you can define your own report or use the standard selection report RPLFST01. If you assign a report variant to the SAP user via the user parameter VSR (Selection report variant), the user can skip the report's selection screen.

#### **Data Entry Profile: Cost Accounting Variant**



If you implement Payroll, various data entry scenarios are available for cost accounting. Data entry scenarios include the following:

Assignment of personnel costs to the master cost center: In this scenario, the employee's master cost center is debited with the personnel costs. The costs are not allocated between the master cost center and the receiver object or sender cost center of an activity. This data entry scenario is used if you do not use SAP Payroll.

Assignment of personnel costs to the receiver object: In this scenario, you assign the personnel costs for the recorded working times to the receiver object of an activity. You would use this scenario if you do not perform activity allocation. This data entry scenario is used if you use SAP Payroll. It corresponds to entering cost assignment information in Time Management.

Assignment of personnel costs to the sender: The personnel costs are assigned to the sender cost center or the sender business process of the activity. In addition, activity allocation is performed. This data entry scenario is relevant only if you use SAP PayrollI. It corresponds to entering activity allocation information in Time Management.

Activity allocation between master cost center and sender: The personnel costs are assigned to the employee's master cost center. Activity allocation is performed. If the sender of an activity allocation is a business process or a cost center other than the employee's master cost center, an additional activity allocation is performed between the sender and the employee's master cost center. This data entry scenario is relevant only if you use SAP Payroll.

**Account assignment to activity type:** Account assignment to an activity type is possible if you use the last two scenarios described above.

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#### **Data Entry Profile: Default Values**



Default values /			
Controlling area	Master cost center	Cost center	
Activity type	Sender bus, process		
Purchase order	Service master	☐ Wage type	
Att./absence type			
Nata Er	ntry Profile: Default Values		

You can set default values for the Cross-Application Timesheet using the following options:

- Controlling area: The default value is the controlling area defined in the employee's organizational assignment (Organizational Assignment infotype (IT0001) in Human Resources).
- Master cost center: The default value is the cost center defined in the employee's organizational assignment (Organizational Assignment infotype (IT0001) in Human Resources).
- Cost center, Activity type, Sender business process: The default values for the timesheet are determined from the specifications made for the personnel number in the Time Sheet Defaults infotype (ITO315). They are used only if a receiver is specified.



#### Note:

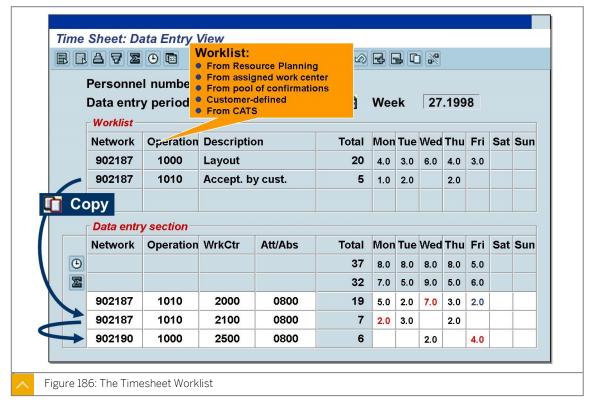
If you have entered both a sending business process and a sender cost center in the *Time Sheet Defaults* infotype (ITO315), the sending business process has priority over the sender cost center.

- Purchase order, service master: The default values for the timesheet are determined from the specifications made for the personnel number in the Time Sheet Defaults infotype (IT0315).
- Attendance/absence type, wage type: The default values are determined from the information in the data entry profile.

All default values can be overwritten.

#### The Timesheet Worklist





The worklist consists of employee specific and object related information, for example an employee's planned hours of operations from *Logistics*. The worklist can be used in profiles for single entry in the *Logistics* component.

The worklist is displayed in a separate section of the timesheet, above the data entry section.

The contents and the display fields of the worklist are defined using the profile maintenance and the field selection for the worklist.

The worklist may contain the following information:

- Time data that has been recorded in the timesheet
- Data from Logistics: Resource planning (capacity splits), pools of confirmations, activities assigned to the employee based on his or her work center assignment
- A customer specific worklist that has been created using SAP enhancement CATS0001.

The lines in the worklist contain information on planned or completed work. They can be copied to the timesheet and overwritten if necessary.

#### Data Entry Profile: Worklist



١	Worklist /				
	☐ With worklist	☐ In Process	In proc. since	D	ays
	From resource ping	By work center	Workdays only		
	From pool of confs	Customer enhancement	From Project Ass	ignment	
	Copy without hours				
	Figure 187: Data Entry F	Profile: Worklist			

You have the following options for setting up the worklist:

- With worklist: A worklist is only displayed if you select this option. You use field selection to determine which fields are displayed in the worklist.
- *In process:* : Data that has already been recorded for the employee is displayed. It can be copied for reference. The recorded times, however, are not copied with the data.
- In process since n days: Limits the recorded timesheet data that is displayed in the worklist.
- From Resource Planning: Data from Resource Planning (capacity splits) is entered in the worklist for the relevant employee.
- From work center: Operations and suboperations and/or operation elements that are assigned to the employee via the work center are entered in the worklist.
- Workdays only: Specifies whether the hours displayed in the worklist are to be distributed only over workdays or also non-workdays.



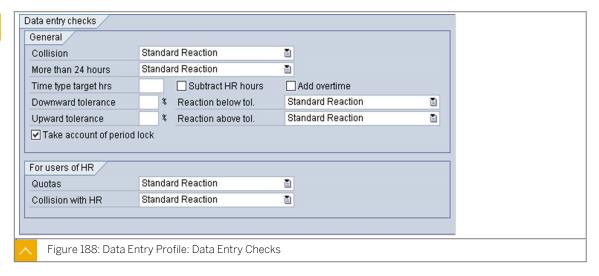
#### Note:

This field is not evaluated if the *Only workdays* indicator was set in the *General Settings*.

- *From conf. pool:* The system enters information from a confirmation pool, specified when the timesheet is accessed, in the worklist.
- *Customer enhancement:* Specifies whether customer-specific objects can be entered in the worklist. The system uses the *CATSOO01* SAP enhancement.
- From Project Assignment:: Specifies whether data from *cProjects* is to be displayed in the worklist of the timesheet.
  - If you select this field, users have the option of entering the working time attributes from *cProjects* that are relevant for them in the worklist.
- Copy without hours: When the worklist is copied, the hours it contains are not copied with it.

#### Data Entry Profile: Data Entry Checks





**Collision:** The system checks for time collisions between CATS records. Time collisions can occur in records that specify clock times or in full day absence records.

*More than 24 hours:* The system checks whether more than 24 hours have been entered for an employee.

*Time type target hours:* This field works in combination with the *With target hours* field in the General settings section. You can use the *With target hours* field to specify a time type, which is filled during time evaluation. The corresponding hours appear in the timesheet. If no time type is specified, the system uses the target hours from the employee's work schedule. They can also be determined by an SAP enhancement.

**Subtract HR hours:** Attendances and absences that were entered in *Time Management* are deducted from the target hours.

**Add Overtime:** Determines that the system adds overtime hours from the Overtime infotype (IT2005) to the target hours for the day currently being processed.

*Upward/downward tolerance:* Minimum or maximum percentage by which the value entered may fall below or exceed the target hours.

**Take account of period lock:** You can use this indicator to prevent data being entered in the timesheet for days that are in a controlling period that is already locked.

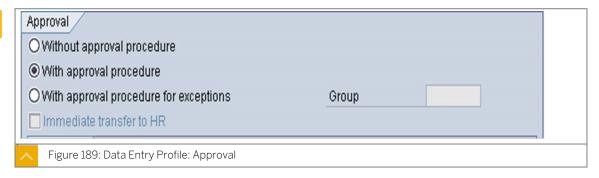
**Quotas:** If attendance or absence quotas are exceeded, a warning or error message can be issued at the data entry stage.

**Collision with HR:** CATS records may collide with records from *Time Management*, for example, records with clock times and full day absence records.

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#### **Data Entry Profile: Approval**





**Without approval procedure:** Specifies that Records do not need to go through the approval process.

**With approval procedure:** Specifies that records need to be approved before they are transferred to target components.

With approval procedure for exceptions:: Specifies that records need to be approved for the exceptional cases, that is, overtime, and so on.

Immediate transfer to HCM: Specifies that records are transferred to Human Resources immediately. You can only select this option if you implement the Timesheet and *Human Resources* in one system. If you select this option during profile maintenance, the *Approval required* option must be deselected.

#### **Data Entry Profile: Workflow**



	orkflow ] With SAPBusiness Workflow ask	☐ With Auto. Determination of Re	cipient	
^	Figure 190: Data Entry Profile: Workflow			

SAP Business Workflow is a tool that enables fully automated electronic processing of business activities.

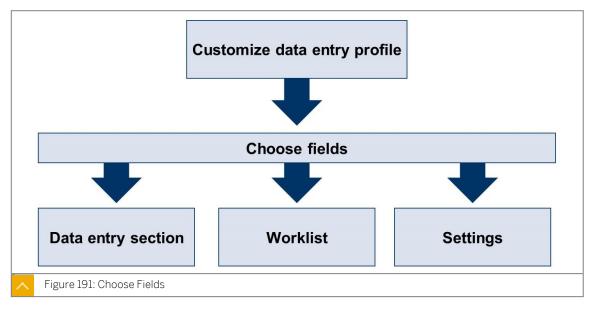
Workflow for approval: The employee is notified of released timesheet data.

**Automatic determination of recipient:** Automatically determines the workflow approver. You must have an automatic role determination in the workflow task.

**Task identification:** This is the internal and unique identification of a task. The identification is assigned automatically when a task is created. It consists of a two character abbreviation for the task type and an eight figure number.

#### **Choose Fields**





You can use the field selection to specify which fields are displayed in the *Data Entry* section, *Worklist*, and *Settings*, and to determine their attributes. In addition, you can use the field selection to define to which target components timesheet data is transferred. The levels of field selection include the following:

- **Modifiable:** Used to define the general field selection that is valid for every data entry profile. These settings have priority over the settings you make under *Influencing*.
- **Influencing:** Used to define which fields are displayed when a particular data entry profile is used.

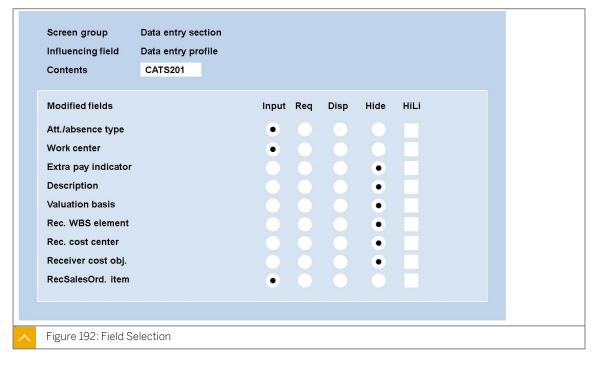
Within each of these two levels, you can specify the fields for the settings, worklist, and data entry sections.

The process for field selection includes the following:

- Choose *Modifiable* first to select the fields that you want to show or hide on a general (client-based) level. Choose *Influencing* next to select the fields you want to show or hide for a specific profile.
- To make it more user friendly, you should try to keep the number of fields displayed on the data entry screen to a minimum.

#### **Field Selection**





After you have maintained the data entry profile, you select the fields that you want to appear in it. The following options are available:

• Select Settings, Worklist, or Data entry section and then choose Modifiable or Influencing.



#### Note

If you choose *Modifiable*, the selection is valid for the entire client and for all profiles.

- If you choose *Influencing*, you must specify which data entry profile the field selection is valid for.
- The additional fields are customer defined fields that can be displayed in the timesheet. They can be used for reporting, but not for transferring data. You can define up to ten customer fields.
- In the field selection, you define whether a field in the timesheet is ready for input, displayonly, or hidden. In addition, you can choose to have a field's content highlighted. You should not select the *Required entry* option for your fields because of the tabular format of CATS data entry.
- You can use the task type, task component, and task level fields to specify the elements of a task that are relevant for valuation.



#### **LESSON SUMMARY**

You should now be able to:

Set up a CATS data entry profile

## Unit 9 Lesson 4

# Recording Time Data in the Cross-Application Time Sheet (CATS)

#### **LESSON OVERVIEW**

This lesson outlines the processes involved in recording time data on the Cross-Application Timesheet.

#### **Business Example**

As the time administrator, you are responsible for the set up of processes related to maintaining employee time on the Cross-Application Timesheet. To set up CATS processes, you require the following knowledge:

An understanding of Cross-Application Timesheet processes



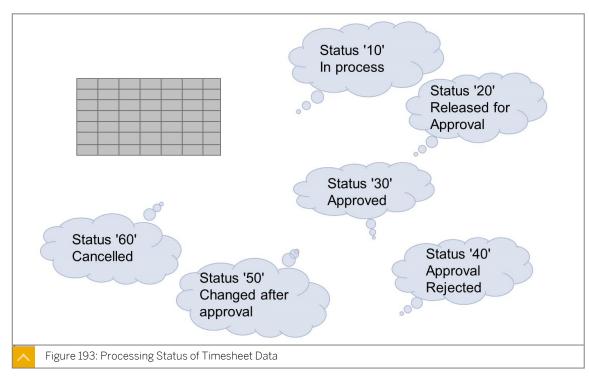
#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

· Record time data for an employee

#### **Time Data Entry**







During the CATS process, the processing status of the timesheet data changes depending on the step performed and on the settings in the data entry profile. The status keys include the following:

• Status "10": In process

• Status "20": Released for approval

· Status "30": Approved

• Status "40": Approval Rejected

• Status "50": Changed after approval

• Status "60": Canceled

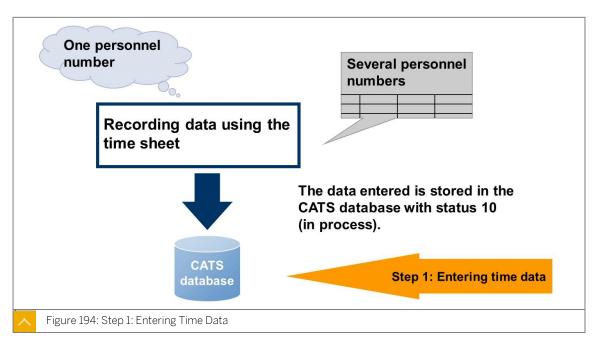


Note:

A CATS document number is created once it reaches status 30.

Step 1: Entering Time Data





The methods of entering time data in the timesheet include the following:

- · Single entry for one employee.
- Data entry for several personnel numbers using the person list.

If you use the single entry option, you choose one data entry profile and one personnel number. You can only enter time data for that personnel number.

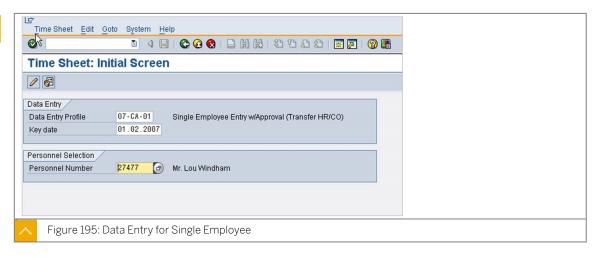
To use one entry profile as a default, you can specify parameter CVR in the user parameters.

You can enter data for a single employee using the transaction CAT2. The transaction CAT2 allows you to select a Personnel Number based on the Data Entry profile. The initial entry fields within the *CAT2* transaction screen include the *Data Entry Profile* as well as the employee's *Personnel Number*. It is possible to either enter times or change settings on this

screen. If you select the button for entering times, a new screen opens and you can enter working times.

#### Data Entry for Single Employee



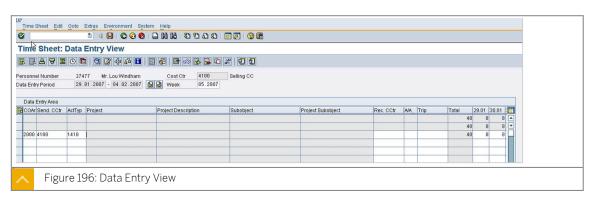


The data entry view of the *CAT2* screen includes the *Controlling Area*, the *Sender Cost center*, and the *Activity type*. Optional information includes information on the absence type or the trip number undertaken, so that the time can be allocated to these activities accordingly. It is also possible to specify the *Receiver Cost Center*. The time spent for each cost center and on each activity can be entered in the various fields made available for the days.

There are several buttons at the top of the screen. Most of these are the standard SAP buttons but some of them are unique to the *CAT2* screen and represent specific features.

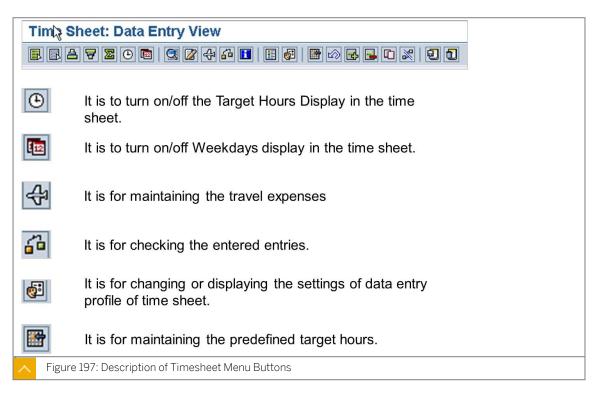
#### **Data Entry View**





#### **Description of Timesheet Menu Buttons**



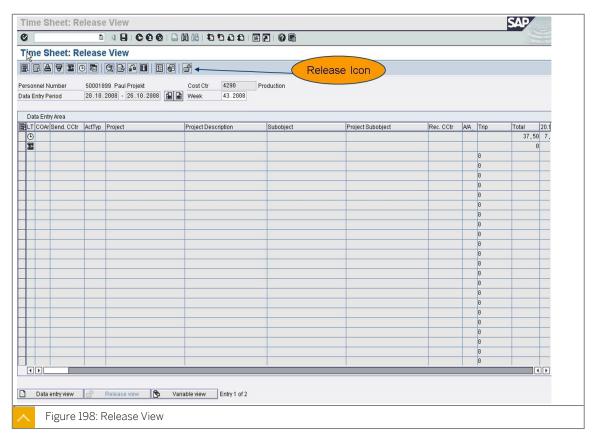


#### **Release View**

At the bottom of the data entry screen, the following buttons are available:

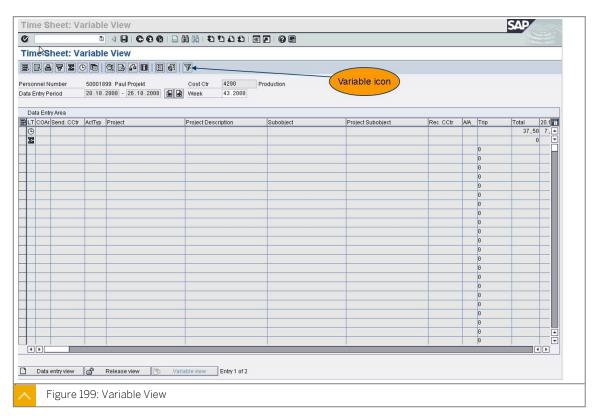
- Data Entry View: This is the default view that opens up when the CAT2 transaction is executed. In this view, it is possible to display or process working times and their respective working time attributes for a specific data entry period.
- Release View: In this view, an overview of the data entered in the CATS sheet can be viewed in accordance with the respective processing status.
- Variable View: The variable view allows a select view of the entered data. It can be used to obtain an overview of all data with a particular processing status.





#### Variable View





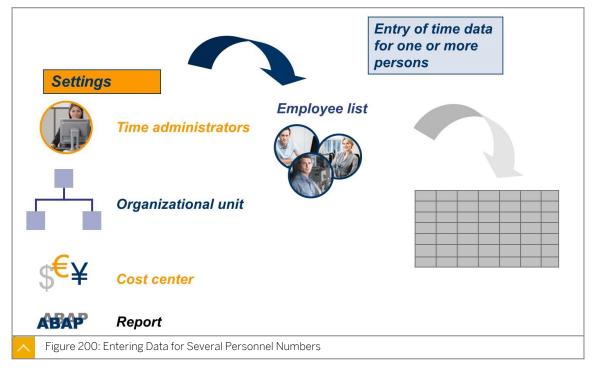
You can access a list of personnel numbers for whom you can edit time data.



After the recorded data has been saved, it is stored in the CATS database with the status "10" (in process). There are some data entry profiles where the data is released or approved as soon as it is saved.

#### **Entering Data for Several Personnel Numbers**





You can enter time data for several personnel numbers using a list of personnel numbers. This requires a profile that permits data entry using a list of personnel numbers.

You can use the Settings function to select a person list according to different criteria. You can generate a list of personnel numbers according to different criteria. You can select employees for whom a particular time administrator in a specific administrator group is responsible. The time administrator and administrator group are stored in the Organizational Assignment Infotype (IT0001) for the employees. You can also select employees from a particular organizational unit or cost center. An employee's assignment to an organizational unit and cost center is also stored in the Organizational Assignment infotype (IT0001). A further option is to generate the list of personnel numbers using a report. In the standard system, report RPLFST01 is available for this purpose.

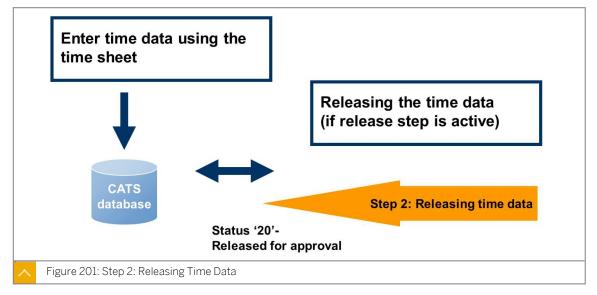
When you set up the data entry profile, you choose one of the selection options *Time administrator*, *Organizational unit*, *Cost center*, or *Selection report* as a default value for selecting the list of personnel numbers.

If only the *Select via pers. list* field is selected, you can choose **one** of the personnel numbers listed and process it in single entry.

If the *Entry for several personnel nos.* field is also selected, the selected personnel numbers are processed in list entry. In this case, the worklist functions are not available.

#### **Time Data Release**





The purpose of the release step is to make the time data available for approval. The release step is optional and depends on the setup of the data entry profile.

When time data is released, certain checks are performed, for example a quota check. If a leave absence is entered, for example, the system checks whether the employee still has enough leave days.

The data can be released as soon as it is saved, or in a separate release step.

Upon saving the data, the system checks objects (for example, correct cost center or attendance type) - regardless of whether the data is released as soon as it is saved or later in a separate release step.

Depending on the profile settings, you can release time data as soon as it is saved, or in the release view.

If you have set up your data entry profile so that the release step is skipped, the time data is assigned the status "20" (released for approval) when it is saved.

#### **Customizing the Release Step**



General settings		
✓ Profile changeable	✓ Highlight rej. recs	✓ Release future times
✓ With target hours	✓ Highlight addnl info	✓ Release on saving
✓ With totals line	☐ Workdays only	☐ No changes after approval
With clock times	Display weekdays	
No Deductn of Breaks	☐ No initial screen	
Cell length		Trip schema
Authorization		
Print program		
Figure 202: Customizin	g the Release Step	

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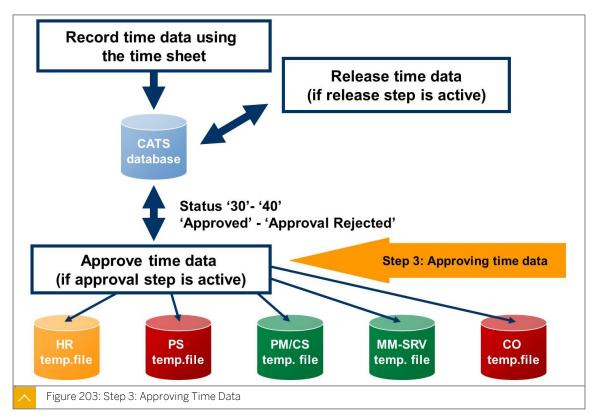
The parameters for customizing the release step are stored in the *General settings* section of the data entry profile.

The *Release future times* parameter determines whether or not you can release time data that has been entered for future periods.

The *Release on saving* parameter determines whether the time data is released as soon as it is saved or in a separate release step.

#### **Time Data Approval**





The purpose of the approval step is to check the time data before it is transferred to the target component. The approval step is optional and depends on the setup of the CATS profile.

Only released time data (status 20) can be approved.

Only approved time data (if an approval is required) can be transferred to the target components.

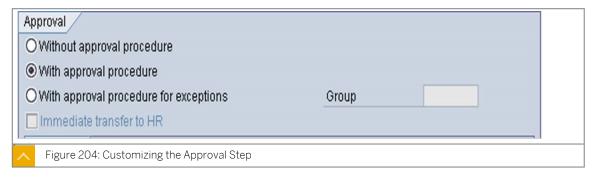
At the approval stage, time data can either be approved or rejected. If the data is rejected, a rejection reason can be specified. Rejection reasons are stored in Customizing.

If you have set up your data entry profile so that the release and approval steps are skipped, the time data is assigned the status "30" (approved) when it is saved.

Approved time data is flagged as approved and copied to the interface tables for the target components.

#### **Customizing the Approval Step**

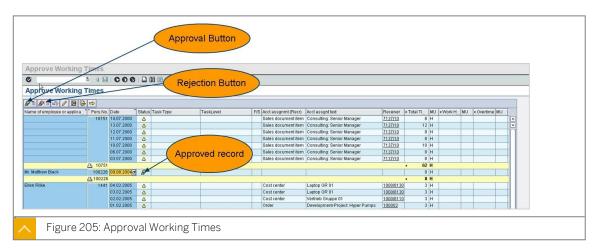




The Approval required parameter in the Approval settings for the data entry profile determines whether or not the timesheet data must be approved before being transferred to the target components.

#### **Approval of Working Times**





#### Approval of Working Times

Approve Working Times enables you to approve recorded working times. Approvers have all recorded time data records for the employees assigned to them. Once the approver approves the time entry, the records are ready for transfer to the target component(s). The *Approve* and *Reject* functions enable you to approve and reject data records. When you reject a data record, you can specify a rejection reason. You can display detailed information about important working time attributes. You can calculate totals and subtotals.

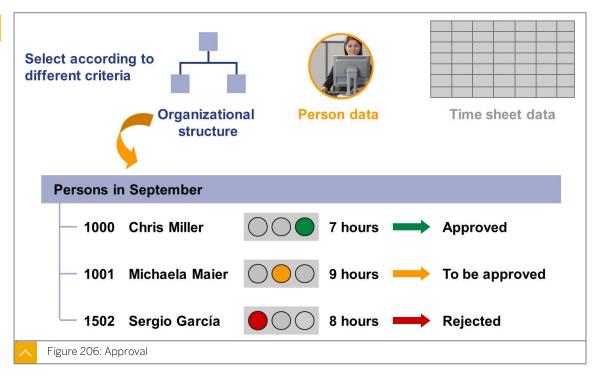
The approval procedure can also be performed using a workflow.

For example: As soon as time data is released in the timesheet, the manager receives a message indicating data is available for approval. The manager can go straight to the approval step by choosing the relevant button.

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#### **Approval**





Selection options for selecting the time data to be approved include the following:

- Selection using organizational structure. For example, you can select all employees assigned to a particular organizational unit.
- Selection according to personal data. You can select time data according to the employee's organizational assignment.
- Selection according to timesheet data. You can select time data with a particular status or according to sender parameters such as cost center, purchase order; or receiver parameters such as cost center, order, and so on.

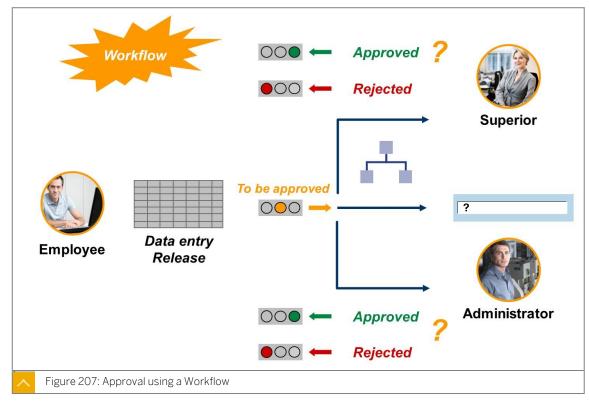
The color of the traffic light changes according to which task has been carried out:

- Green: The entries have been approved.
- Yellow: The entries are available for approval.
- Red: The entries have been rejected.

If a data record is rejected, it can be assigned a rejection reason. Rejection reasons can be stored in Customizing.

#### Approval using a Workflow





If you want to use workflow for the approval process, select the relevant option in the data entry profile. Employees responsible for approving time data are notified automatically and can run the approval report (*RCATSB01*) for the relevant personnel numbers directly from their *Inbox*.

The SAP standard system includes different standard workflow tasks for the CATS approval process. The following workflow tasks are available for the CATS application:

- 1. TS31000004: CATS Approval
- 2. TS31000006: CATS Approval by Time Administrator
- 3. TS31000007: CATS Approval by Supervisor

If the employee releases a timesheet record, the correct agent is determined by the workflow tasks and the work item is sent to the responsible person. However, if the employee releases additional time entries, then the agent determination is lost and the work item is sent to all the possible agents instead of the responsible agent.



#### Note:

You can specify the approval for specific time entries while not requiring approval for all time entries.



#### LESSON SUMMARY

You should now be able to:

Record time data for an employee



### Unit 9 Lesson 5

### **Identifying Elements of CATS**

#### **LESSON OVERVIEW**

This lesson explains the basic configuration required to customize the Cross-Application Timesheet (CATS).

#### **Business Example**

As the time administrator, you are responsible for the set up of the CATS timesheet. You must set up the basic configuration required to make the relevant time data available on ESS. This will enable employees to enter their time data in ESS. To complete this set up, you require the following knowledge:

• An understanding of CATS configuration activities



#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Configure the approval procedure

#### **CATS Customizing**

In this lesson, we will review the basic configuration which is required to enable employees to record time data using ESS.. The Web application enables employees to record their working times and assign these to a project, order, or other SAP application objects.

The CATS regular Web application has a number of services enabling employees to access the application. The links to these services are displayed dynamically on the Working Time homepage according to the status of the working time recorded.

Configuration activities include the following:.

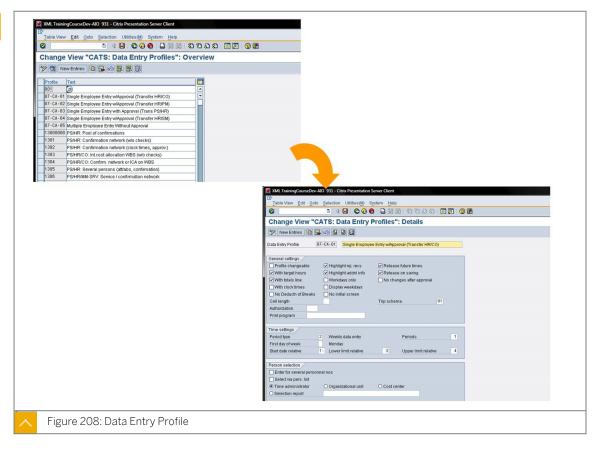
#### Set Up Data Entry Profiles

In this activity, the *Web* application *CATS regular for the Cross-Application Timesheet* is set up. CATS regular is part of the business package for Employee Self-Service (SAP ERP). Prerequisites which need to be in place prior to making this setting include the following:

- You must have made the general settings for Employee Self-Service.
- You must have created a system user name in the *Communication* infotype (ITO105) for each employee who is to record working time using *CATS Regular*.
- You must have used the user parameter *CVR* to assign each employee a specific data entry profile, which they use to enter their working times. This profile determines the data entry process and the layout of the timesheet. If this user parameter has not been stored, the system uses the ESS data entry profile as standard.
- You must have assigned the required authorizations to all users.



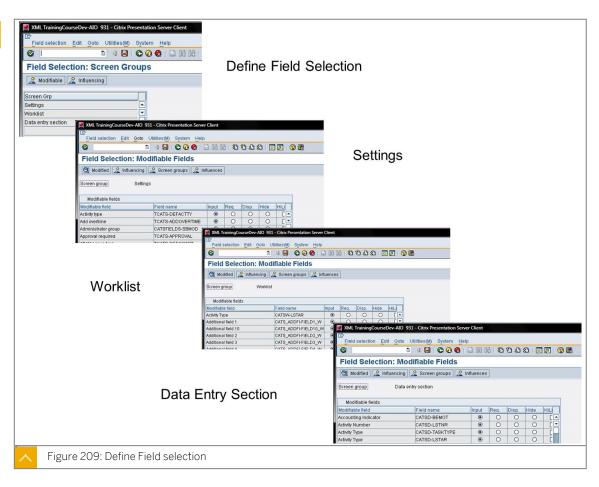




#### **Define Field Selection**

In this step, you decide which fields should appear on the screen when maintaining or displaying the timesheet, and also define their attributes. This enables you to customize the layout of the timesheet to meet your business requirements and the needs of the users. By choosing suitable fields, you can considerably simplify timesheet data processing and reduce potential sources of errors.





The two different types of fields which need to be selected for any particular data entry profile include the following:

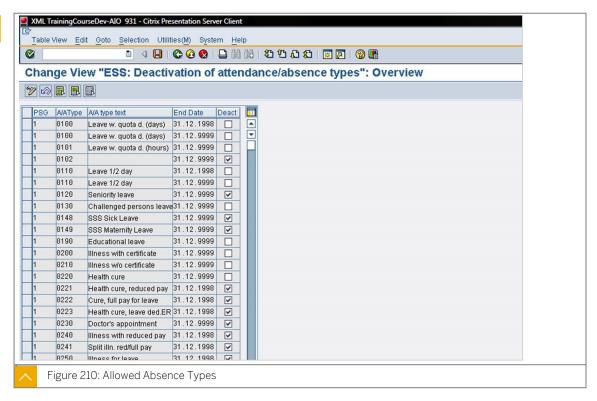
- General field selection
   In this step, you maintain the basic settings for all data entry profiles.
- Profile specific field selection
   In this step, you decide which fields should appear on the screen when maintaining or displaying the timesheet, and define their attributes, for individual profiles.

#### **Select Allowed Absence Types**

In this step, you define the absence types that the employees are allowed to enter in *CATS Regular*. You need to decide which absence types are not to be processed using *CATS Regular*.





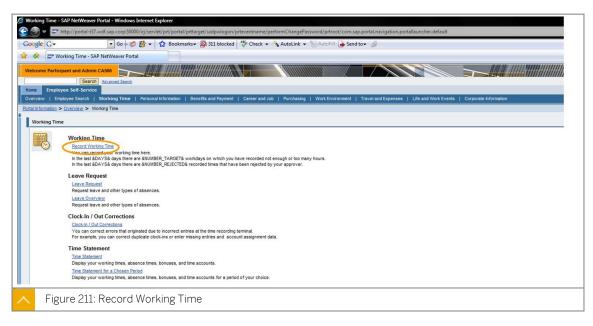


#### **CATS on ESS**

There are various activities that an employee can perform using ESS.

1. **Recording Working Times:**Employees record their working times by selecting the Web application *Record Working Times*. Employees then enter their attendance and absence types, sender and receiver cost centers, and the number of hours worked. Employees can either use the default values proposed for their profile or use the search functionality on the *CATS view* to enter this data.





2. **Saving Working Times:** Employees enter their working time and save the data for review and final release at a later time.

3. **Saving and Releasing Working Times:** At the end of the time recording period, employees might want to review the times entered and saved earlier, make modifications, and release the time for approval by the manager or the time administrator as defined in the approval workflow.

#### **Facilitated Discussion**

#### **Timesheet Approval Process**

#### **Analysis for the Approval Process**



Approval Process (customer questionnaire)	Resulting Design Principles	
Mass approval (often 100-200 data sets per week)	Present a consolidated view in the collective approval screen	
Periodic approval (such as monthly; not usually workflow driven)	Support for automatic data selection	
Approval is often done by line managers or project leads	Enable approval as a one click action	
Reasons for rejection:	Support for scanning data where approval is likely to be denied	
Unapproved overtime		
Incorrect account assignment		
Project budget exceeded		
•		
Data is approved in 99% of all cases	Better support for approval by project leads	

#### **Data Selection**

#### Data selection is determined in the following ways:



#### CATS approval in MSS (role: Manager)

The selection of data of employees for whom the manager is responsible is handled using Selection IDs (similar to Time Manager's Workplace).

#### CATS approval in Project Self-Service (PSS):

The selection of datasets for projects the project lead is responsible for is handled by a BAdI.

If workflow is used, only one work item for CATS approval is generated.

The following Web Dynpro applications available for approving working times:

- CatManagerApprove (approval by line manager)
- CatProjectApprove (approval by project manager)

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Both applications provide the same functions. They only differ in the specific form of data selection they use.

Data selection for the Cat Manager Approve application:

Use this Web application if you want the superior to approve the employee's working times. To use it, you have to select the working times to approve using the employees' personnel numbers or through Organizational Management. You can define the selection in Customizing with the *Organizational Views* or *Selection ID* from the *Time Manager's Workplace*. In addition, you can use the method *EDIT\_SELECTION* (change set of records to approve) of the *BAdI HRCATS\_APPR\_CUST* (*BAdIs for CATS collective approval*) to influence the data selection.

Data selection for the Cat Project Approve application:

Use this Web application if you want project managers to approve working times depending on the entered working time attributes. To use it, you have to select the working times for approval by the entered working time attributes. The *Project Self-Service* portal provides several suitable selection methods. In addition, you can use the method *EDIT\_SELECTION* (*change set of records to approve*) of the BAdl *HRCATS\_APPR\_CUST* (*BAdls for CATS collective approval*) to influence the data selection.

#### **Collective Approval Screen**

The collective approval screen includes the following views for the display of data:



Line Manager View	Data is displayed per week, per employee  Comparison of recorded hours with target hours (work schedule)
Project Lead View	Data is displayed per week, per project  Comparison of recorded hours with open hours and total budget (BAdI)

Further views with different consolidation criteria can be defined in Customizing. Several approval views can be grouped in one approver profile and assigned to the user. The user can perform all actions (approve, reject, set to resubmission) on the consolidated level or drill down to the individual approval screen.

Your HR managers, project managers, and so on, can use this Web application to approve or reject data recorded with the *Cross-Application Time Sheet* (CATS). The Web application supports periodic approval, replacing (or complementing) workflow-based approval of working times.

The line manager view includes the following information:

- Data is displayed per week per employee
- Comparison of recorded hours with target hours (work schedule)

The project lead view includes the following information:

- Data is displayed per week per project
- Comparison of recorded hours with open hours and total budget (BAdI)

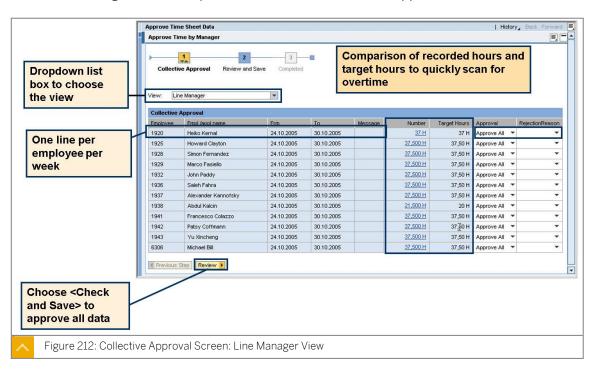
Further views with different consolidation criteria are defined in *Customizing*. Several approval views can be grouped in an approver profile and assigned to the user. The user can perform all actions (approve, reject, set to resubmission) on the consolidated level or drill down to the individual approval screen.

You can use this Web application as an alternative to the RCATS\*01 (Cross-Application Time Sheet: Approve Times) and RCATS\_APPROVE\_ACTIVITIES (Approve Working Times) reports. This lets you offer the approvers at your company an application that you can integrate in Manager Self-Service, Project Self-Service, or a different manager portal.

#### Restrictions

When the approval reports run on the back-end system, approvers can also change the recorded working times. This option is not available in the Web application.





The Web application enables the approval of all the CATS data that employees have entered in the various application interfaces. This means they do not have to use the Employee Self-Service application for the cross-application timesheet (CATS Regular / Record Working Time (Web Dynpro)) to enable this application.

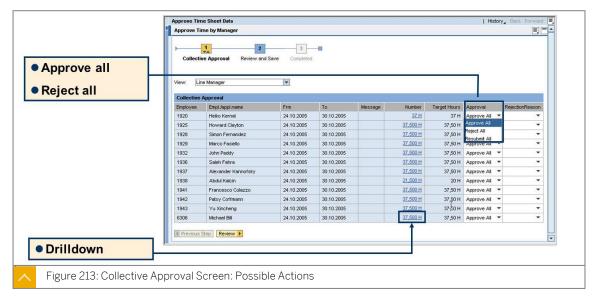
The objective of this Web application is to simplify and speed up approval of the recorded working times. You can define collective approval criteria for the data in customizing and carry out a mass approval. Of course, you can also approve single records as required.

You can restrict the set of working times requiring approval by defining working times that meet certain criteria as relevant for approval.

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#### **Collective Approval Screen: Possible Actions**





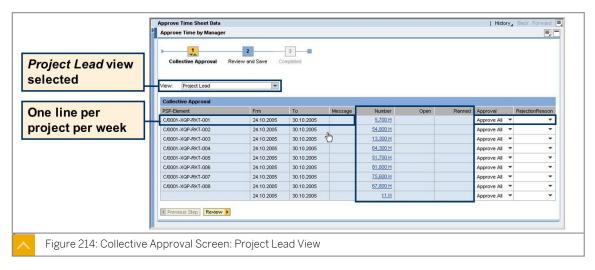
The collective approval screen is the initial screen for the Web application. This screen groups the data in each line. There is an option to approve all, reject all (optionally with a rejection reason), set all data in one line to resubmission, and drilldown to an individual approval screen.

In mass approval, approvers can approve all the data that meets a collective criterion within a period at once. Approvers can also navigate from the collective approval screen to the individual approval screen, as necessary, and approve the data individually. Elements to enable mass approval include the following:

- Collective approval is only possible if the approval status of the record approved in the individual approval screen does not differ from the status of the other records.
- To group the data together, you can create different approval views and group them in an approval profile in customizing. In this case, the approval can switch between the different views in the collective approval screen to examine the data from different perspectives for the specific situation.
- You can specify up to 3 collective approval criteria for each approval view in Customizing.
  The data is grouped, sorted, and totaled for the unit and selected period for these criteria.
  You can also display two additional comparison columns where approvers can compare
  the recorded data with other (possibly summarized) values. Data that the system cannot
  assign is displayed in an extra line.

#### Collective Approval Screen: Project Lead View





Managers can use an approval view that groups all the working times entered by a single employee, with the planned working time shown as a comparison value. This enables managers to quickly compare the total recorded working times with the required target. To use this view, you must use SAP Human Resources or SAP Organizational Management.

Project managers would benefit most from an approval view that groups all the working times that have been booked to a project or an order, along with the corresponding activities. They can then compare the total of the recorded data with a budget value, or the times that have already been planned and confirmed. The records that contain an incorrect receiver object can be rejected all at once.

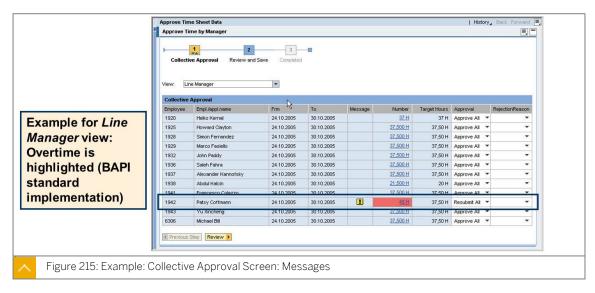
A BAdl enables you to define situations that require special attention, such as budget exceeded, overtime, specific absence or attendance types, or account assignments. Lines with the indicated datasets are marked with a symbol in the message column. The tooltip of the symbol displays the message text. If the criteria applies to all datasets in one line, the sum of hours can be highlighted.

The period for displaying the data defined in customizing is the first sort criterion in the list of data for approval. If necessary, you can use *BAdI HRCATS\_APPR\_CUST* to calculate the total of the values in the comparison columns over this period.

If a weekly period is selected, for example, approvers can determine whether employees have completely fulfilled their weekly working time, or how much a project has progressed within a given week.

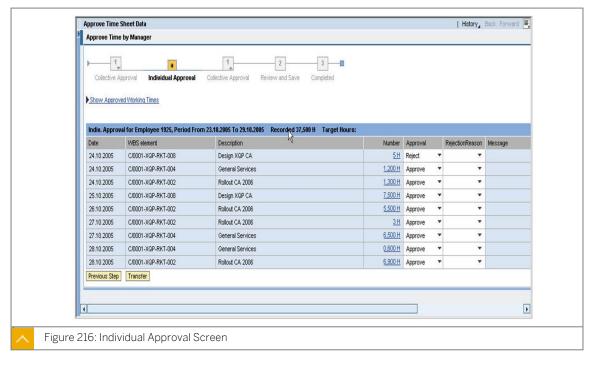
#### **Example: Collective Approval Screen: Messages**





#### **Individual Approval Screen**



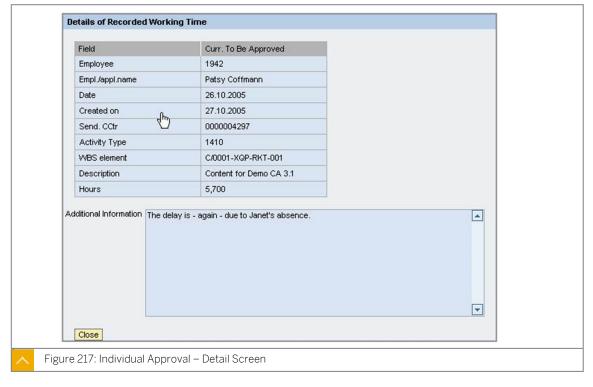


Approvers can use the single approval screen to review the recorded working times and approve them individually. The time can also be rejected, and flagged for resubmission.

The single approval screen presents an overview of all the data recorded for each line of the collective approval and period. To show the single approval screen, click the link to the line total in a line of the collective approval.

#### Individual Approval - Detail Screen





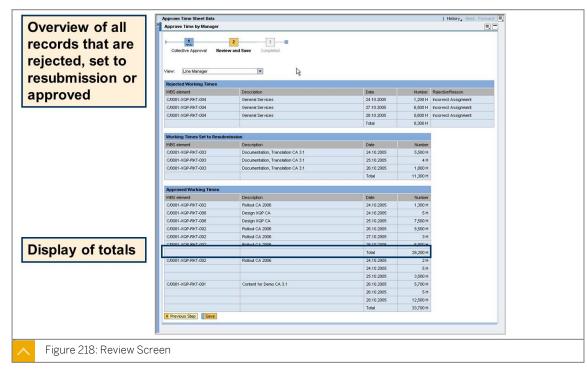
The approver can call up a detail screen for each record to display additional information for that record. The approver can also see whether an employee has changed times that were already approved. In this case, the system contrasts the original data and the changed data.

You can select the fields that you want to display in the Web application in *Customizing*, for both the single approval and the detail screens. Details which can be displayed include the following:

- Entry fields
- Defaulted fields (such as the Sending cost center)
- Additional information
- Descriptions
- Information on who created the dataset, when it was created, and so on

#### **Review Screen**





To obtain a full overview of the period, the approver can output a list with already approved working times for each collective approval criterion and period. This list also displays data that may not be subject to any approval process, for example, because a special approval is used or the data was entered with different data entry profiles.

Where confirmation information is involved, the system assumes that no work schedules were planned for a specific period. Since orders can extend over a long period, the system totals the approved working times over the complete term.

The approval process for recorded working times can include the following attributes:

- Special approval: Only datasets with certain working time attributes are approved.
- Workflow: Determination of the workflow recipient is dependent on entered working time attributes.

For example: A project lead approves all working times that debit a specific project. A BAdI must be used as there is no standard field to enter the user or personnel number of a project lead in *PS* or *cProjects*.

The Business Add-In (BAdI) HRCATS\_APPR\_CUST is used for approval with the Web Dynpro application Approve Working Times of the Cross-Application Timesheet (CATS) component. You can use it to implement more detailed processing of approvals.

The interface contains the following methods:

- Values for the (collective approval view)
- Define texts for the message column (single approval view)
- Determine quantity of comparison columns
- Change text of approving records in text message column

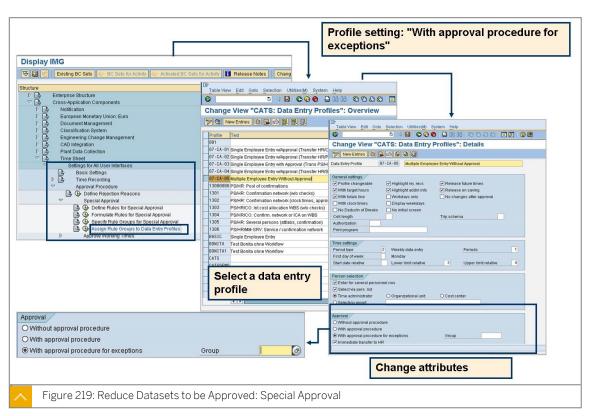
- Authorization check for selected records
- Determine approval profile

In the special approval activity, you create the approval profiles that you can assign to the individual HR managers and/or project managers. You can assign multiple approval views to these approval profiles. If you do, the approver can then choose between them in the Web application.

The approval profiles have the same function as data entry profiles in the cross-application timesheet. Depending on which approval profile is used, the approver is given different information for the data to approve and the subsequent processing is controlled accordingly.

#### Reduce Datasets to be Approved: Special Approval





The special approval activity lets you define the rules with which the special approval is possible. To do so, use the *CATEX* feature (rules for *special approval in the cross-application time sheet* (CATS)). This feature lets you approve the recorded working times, based on the supplied working time attributes.

#### Related Information

Documentation: <a href="http://help.sap.com">http://help.sap.com</a>

In Customizing: Integration with other mySAP.com Components  $\rightarrow$  Business Packages / Functional Packages  $\rightarrow$  Manager Self Service (mySAP ERP)  $\rightarrow$  Working Times  $\rightarrow$  Approval of Working Times

... Check for updated information at http://service.sap.com/cats

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#### **LESSON SUMMARY**

You should now be able to:

• Configure the approval procedure

# Unit 9

# **Learning Assessment**

1.	Which of the following are prerequisites for using the Cross-Application Timesheet (CATS) application?
	Choose the correct answers.
	A Data entry profile for recording employee time data
	B Necessary authorizations for working with the Cross-Application Timesheet (CATS)
	C BAdI HRCATS_APPR_CUST
	D RCATS_APPROVE_ACTIVITIES
2.	Which of the following interfaces are independent user interfaces?
	Choose the correct answers.
	A CATS phone
	B CATS classic
	C CATS instant
	D CATS regular
3.	Which of the following features allows you to approve recorded working times, based on supplied working time attributes?
	Choose the correct answer.
	A CATEX
	B SCHKZ
	C LGMST
	D TMSTA

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# **Learning Assessment - Answers**

1.	Which of the following are prerequisites for using the Cross-Application Timesheet (CATS) application?			
	Choose the correct answers.			
	X A Data entry profile for recording employee time data			
	X B Necessary authorizations for working with the Cross-Application Timesheet (CATS)			
	C BAdI HRCATS_APPR_CUST			
	D RCATS_APPROVE_ACTIVITIES			
2.	Which of the following interfaces are independent user interfaces?			
	Choose the correct answers.			
	A CATS phone			
	X B CATS classic			
	C CATS instant			
	X D CATS regular			
3.	Which of the following features allows you to approve recorded working times, based on supplied working time attributes?			
	Choose the correct answer.			
	X A CATEX			
	B SCHKZ			
	C LGMST			
	D TMSTA			

# UNIT 10

# **Case Study: Configure Time Data Recording**

#### Lesson 1

Configuring Time Data

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#### **UNIT OBJECTIVES**

• Configure time data for an employee

### Unit 10 Lesson 1

### **Configuring Time Data**

#### **LESSON OVERVIEW**

This case study will help you assess how much you have learned during this course.

#### **Business Example**

As an HR time administrator, you are responsible for the configuration of time recording.

In this case study, you will hire an employee and configure time recording options. This case study is divided into individual exercises. The goal is to test your knowledge on the subjects.

First try to complete the exercises without any additional help. If you have any difficulties, refer to the solutions at the end of the relevant exercise. Should you still have difficulties, your instructor is, of course, available.



#### Note:

The instructor will activate the table locks for the case study. When you access certain settings, the system may display a dialog box informing you that the data is currently being edited by another user. If this occurs, wait until the user has finished and try again.



#### **LESSON OBJECTIVES**

After completing this lesson, you will be able to:

Configure time data for an employee



#### **LESSON SUMMARY**

You should now be able to:

Configure time data for an employee

